THE INDIAN COTTON TEXTILE INDUSTRY

(1951-52 ANNUAL)

Editor: **M. P. GANDHI,** M.A., F.R.E.S., F.S.S., J.P.

Member, Co-ordinating Committee, All-India Council of Technical Education; Member, Standing Finance Committee, Indian Council of Agricultural Research; Member, Bombay State Handloom Board; Member, Indian Central Sugarcane Committee; Member, Western Railway Advisory Committee.

Extract from Foreword by Shri MORARJI DESAI, Chief Minister, Government of Bombay:

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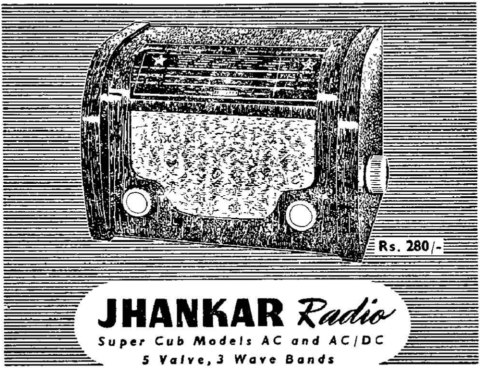

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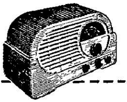

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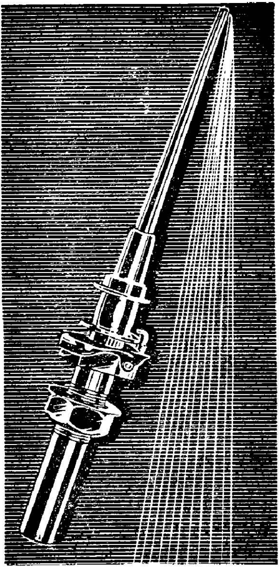

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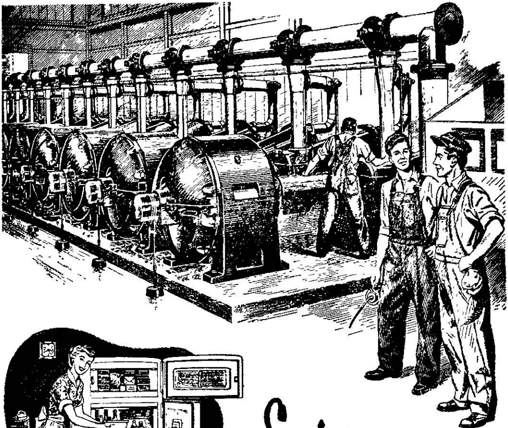

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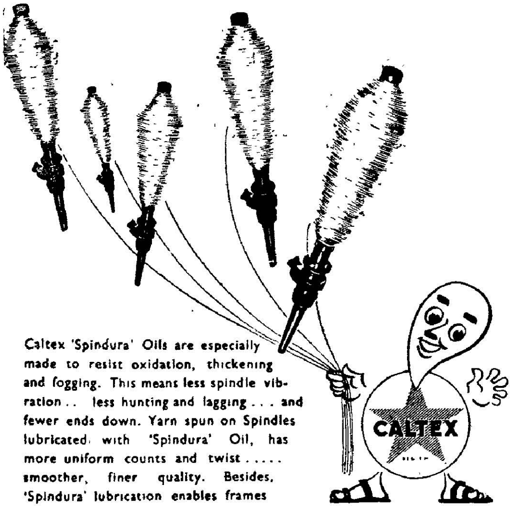

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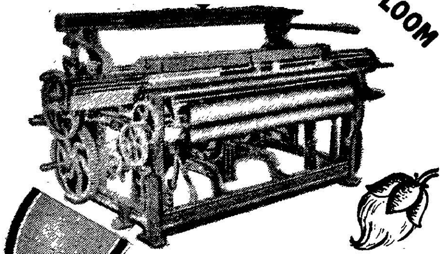

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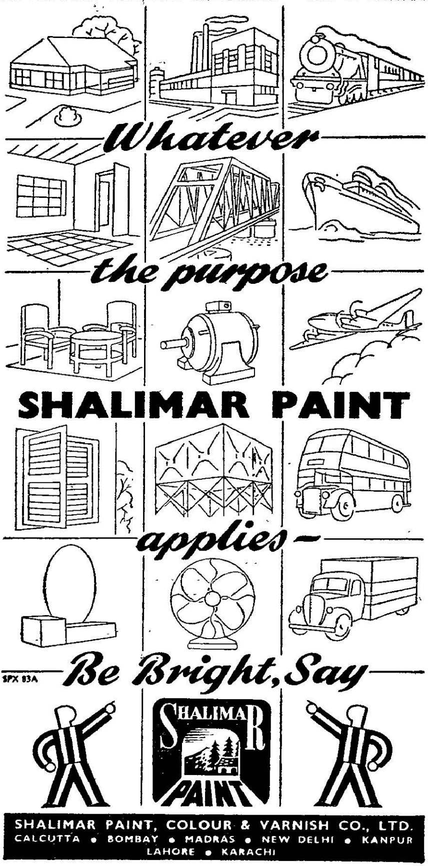
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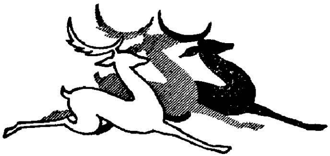

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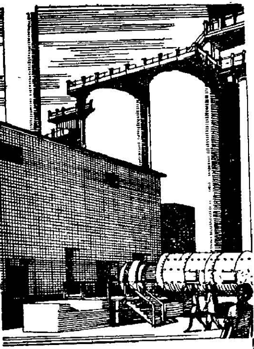

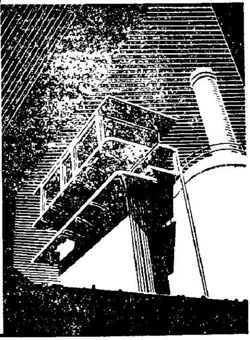

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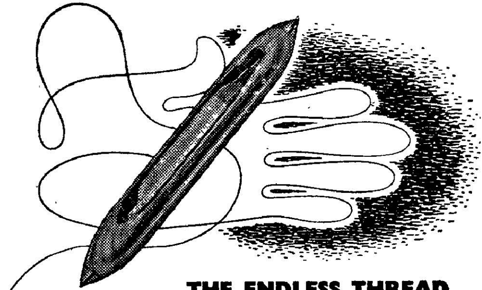

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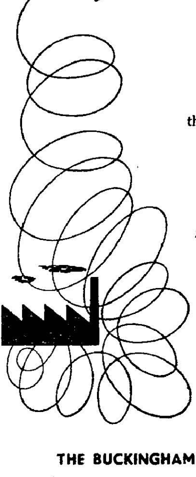

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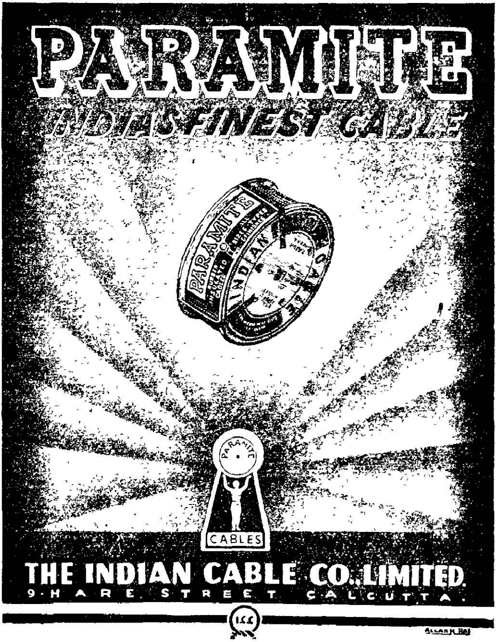
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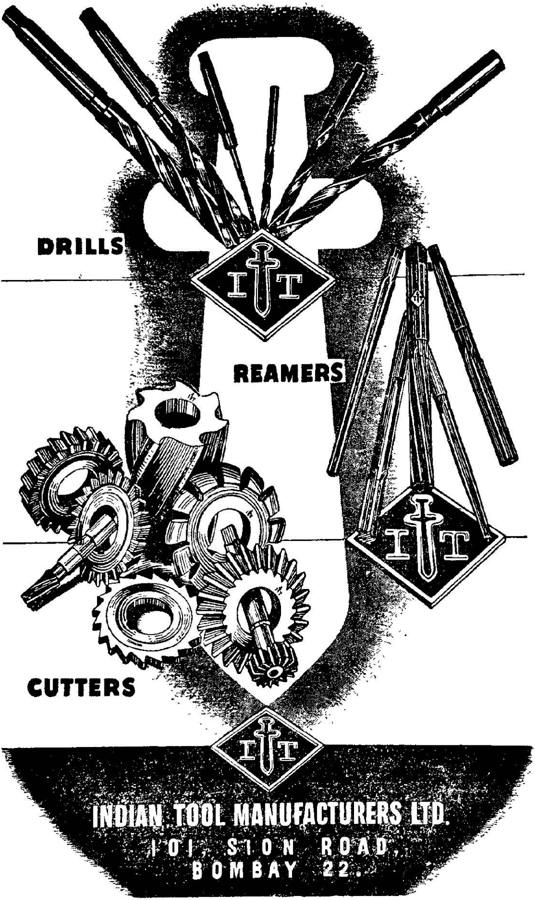
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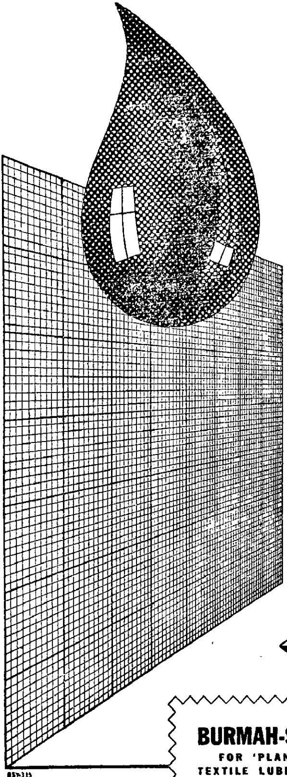

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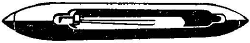

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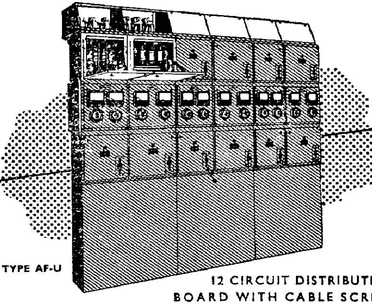

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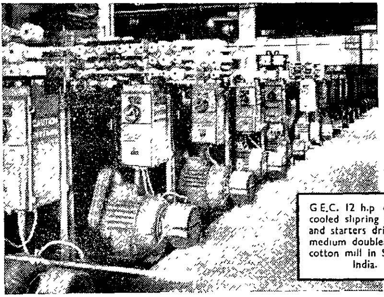

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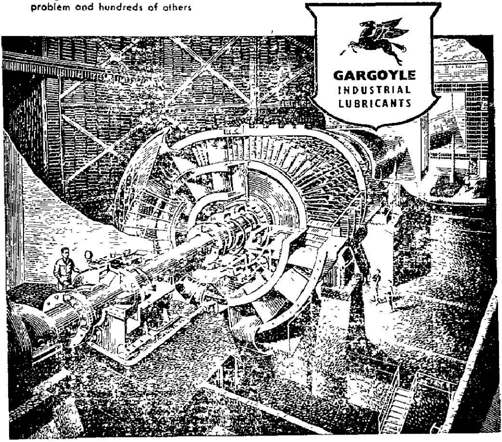

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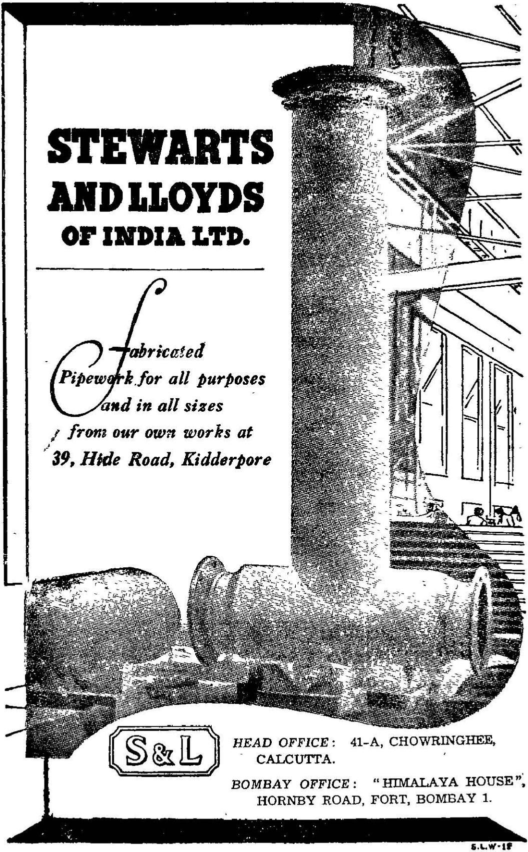
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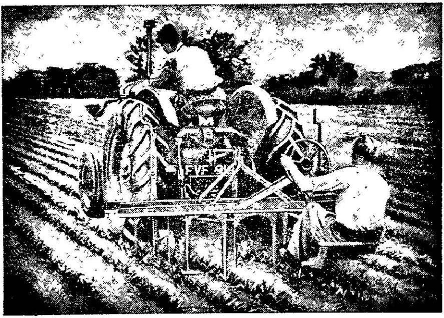

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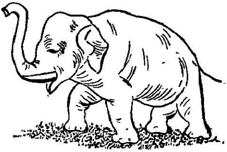

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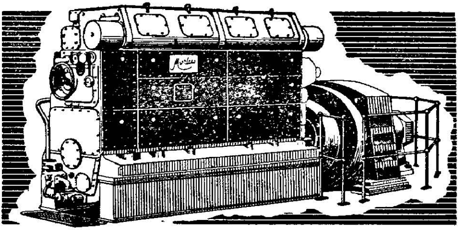

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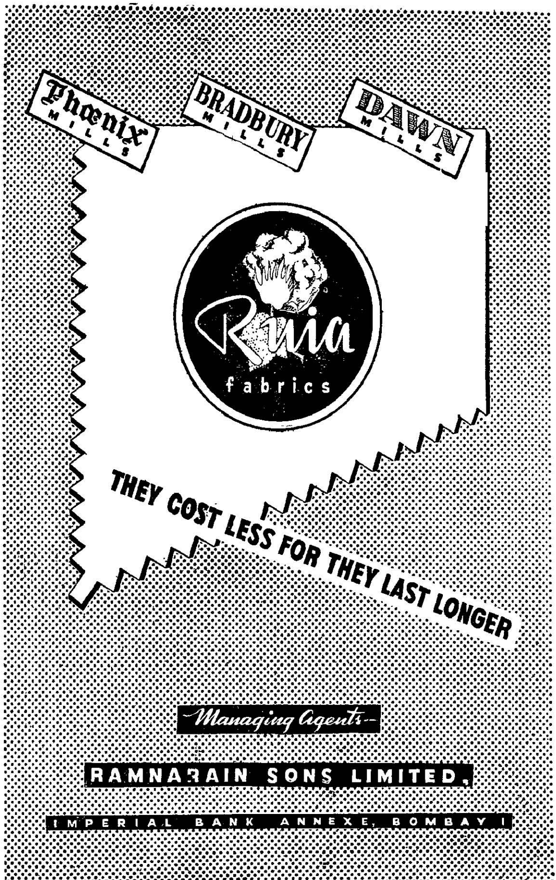
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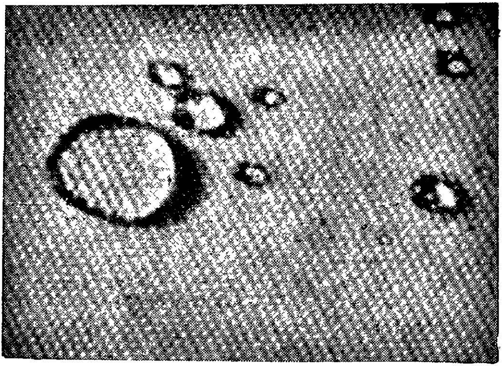

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SISTA'S-AS-28

FOREWORD

by

Shri MORARJI DESAI

Chief Minister, Government of Bombay.

Although the Indian Textile Industry has made remarkable progress in recent years, it is difficult to escape the feeling of sadness that it is standing in the way of the revival of our ancient Indian Handloom Industry which used to be renowned for the finest variety and quality of its products all over the world. That the Textile Industry cannot possibly meet all requirements of selective individual tastes is fortunate enough for the handloom industry. The Handloom Industry can thrive along with the Indian Textile Industry if the two industries have mutually exclusive demands to satisfy.

In order that the textile industry should be able to hold its own in the world markets it will have to overcome several difficulties with which it has to contend at present in regard to the replacement of old machinery and installation of modern equipment, the application of technological researches to bleaching, dyeing, printing and finishing processes of production of cloth. We will also have to grow fine staple cotton in India so that we need not have to depend for our production of fine cloth on foreign imports of cotton. If these improvements are carried out it should be possible for the Industry to export cloth to foreign countries after meeting the requirements of our consumption. I have every hope therefore that industrialists who are engaged in production of cloth will aim at securing the maximum national advantage to the country.

I congratulate Professor M. P. Gandhi on having compiled the Indian Cotton Textile Annual for the year 1951-52, which contains extremely interesting information about the cotton textile industry, and trust that it will be useful to those who are interested in the progress of the textile industry.

Council Hall, MORARJI DESAI.

Poona.

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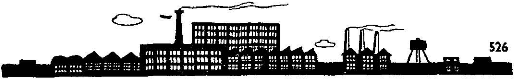


PREFACE

The year 1951-52 in the history of the Cotton Textile Industry has been altogether a very eventful one. It was an year of steady improvement in textile production derived as much from the fairly easy availability of raw cotton as from the smooth industrial relations that obtained throughout. Indeed, had it not been for the cut in the supply of power to the mills in Bombay, the total production figures would have made a much brighter showing. The proof of this has been forthcoming in the month of July 1952, when the monthly production has shown signs of moving up to a record, which one expects will be further improved upon in the coming months, as further relaxation in cut in the supply of electricity is forthcoming. It is also a very happy augury that 2,00,000 textile workers in Bombay City have come to a voluntary understanding with the Bombay Millowners' Association, as regards the receipt of three months' basic wages as bonus for 1951, which involves a total outright payment of Rs. 3 crores. The picture of the cotton textile industry on the production side is thus very satisfactory, especially as indigenous production of raw cotton bids fair to touch 39 lakh bales in 1952-53. The stage is therefore set for as much increase in textile production as we would wish.

If scarcity gives rise to problems of social distress, the existence of plenty also brings with it many a headache to the *entrepreneur*. It has therefore happened that for the past five months, the problem of disposal of accumulated stocks has assumed very serious proportions. We have described in detail, in the following pages, the genesis and the development of this crisis in the mill industry. The slump in textile prices caught many on the wrong foot, particularly those wholesalers who usually were concerned with the disposal of stocks received from the mills. At first, the mills faced the problem of stocks, but slowly the congestion in the manufacturing centres was relieved somewhat. Naturally, the fall in prices of cloth was accompanied by, and probably stimulated also by, severe consumer resistance. The effect was that many of the holders of stocks met with huge losses. For instance, the Government of Bombay is reported to have suffered a loss of Rs. 1.5 crores (estimate) on account of the slump. Thousands of bales of cloth and yarn, valued at about Rs. 7 crores, were lying in the Government godowns without buyers. The prevailing market rates were at least 30 per cent below the prices at which the Government had acquired the stocks from the mills. So they could not dispose of the stocks at the market rates unless they were prepared to incur a loss. The Government, therefore, had to invite tenders from licensed dealers for the sale of part of the stocks. In April 1952, Government would have incurred a loss of Rs. 3 crores if they had tried to dispose of their stocks at the then prevailing prices, but as prices have slightly improved since then, the total loss on the present market rates would be much less. Probably, in course of time, the loss could be reduced even further. It is important to know that this predicament is peculiar to Bombay. Under the

Textile Control Order, the distribution of yarn and cotton textiles should be done either by the State Governments or through their nominees. While all other States had their own nominees (who are now 'holding the baby'), the Bombay Government in its anxiety to eliminate the middlemen's commission and bring cloth to consumers at cheaper rates had invested its money in acquiring cloth and yarn for distribution through its own agencies, with the dire results we now know. This State Government had always held about 6 months' stock on hand to counter any possible price ramp in the markets. We are sure, nobody would grudge or regret such loss as may accrue. Here is an instance of official solicitude being badly rewarded!

It must be said that the Central Government have not been altogether letting the grass grow under its feet, while all this was happening. They immediately liberalised their export policy within the permanent limitations of such a policy. Mills were allowed to export freely out of their stocks of cloth and yarn, and though the export markets have also become comparatively duller than they were in 1950-51, there was still hope in overseas markets for absorption of surplus yarn and cloth from India. New Delhi's permission in June 1952, for free export of Indian cotton and yarn, except 18s and 20s, has latterly provided a great fillip to the export trade. Within a month of the announcement, more than 20 thousand bales are reported to have been booked for Pakistan, Hongkong, Burma and other neighbouring countries. Enquiries are said to be pouring in and prices of varieties which were below control rates have risen by 25 per cent in the past few weeks. The export permission is valid only till the end of August 1952, and so mills and shippers are trying to send as much yarn out as possible, some of them being even inclined to pay premium prices to those who have obtained the necessary licences. The demand for yarn spun from imported cotton is not much, although Government allowed export of six thousand bales of such yarn. In view of the fact that the production of cloth and yarn has been on the upgrade since May 1952, it will not be wrong if the authorities extend the free export permission by 2 or 3 months beyond 31st August 1952.

As regards cloth, in the six months of 1952, about 200 million yards have been exported and New Delhi has decided to extend the time-limit for advance booking of overseas business. It would appear, however, that the periodical revision of cloth prices restrains long-term commitments since overseas buyers are inclined to do business only on a spot basis. The Japanese are expected to offer cut-throat competition in a short time, and that also keeps overseas buyers on the fence. The free licensing of coarse and medium cotton piecegoods has, however, helped considerably the trade. On July 21, 1952, Parliament was informed by the Commerce and Industry Minister that licences without any restrictions were now being issued for the export of coarse and medium cloth and that licensing formalities had been cut down to a minimum. Similarly, 3 lakh bales of certain varieties of short staple cotton were

allowed to be exported to all countries without any control over prices or destinations. Concessions were also given for export of yarn.

Coming to Raw Cotton, it has really been a very favourable year from every point of view. The higher production of Indian cotton, for which due credit must be given to the wise counsels and active promotion of policy by the Indian Central Cotton Committee, has made it possible to cut down the quota of imports of foreign cotton. New Delhi also has followed a wise policy of raising the floors of raw cotton prices for the 1952-53 season by Rs. 55 per candy. Such encouragement to the cotton grower is absolutely essential and moreover, pays dividends, as is evident from the experience of the last two years. Indeed, the Indian Central Cotton Committee, in its deliberations held in July 1952, even felt that the stage would soon be reached when expansion of cotton acreage may have to be stopped in view of its effects on food production. So, an all-out policy of cotton production has been really successful. This is why the Cotton Advisory Board had suggested to the Government that imports should be reduced to a very large extent in the next cotton season. The indigenous crop of 1952-53 is expected to be of the order of 38 lakh bales. On this basis, and on the assumption that the present level of cloth production will be maintained, the gap between demand and supply to be met from imports is not likely to exceed 8 lakh bales. Reduction in imports of foreign cotton has its obvious advantages, as it not only saves foreign exchange but boosts the morale of the Indian cotton-grower. In this connection, we cannot too highly praise the splendid work of the Indian Central Cotton Committee in transforming the face of Indian cotton production. We have grown more and more of the better staples. The reward of their efforts is that, in the current year, while the trade estimated a production of only 32 lakh bales, actual outturn was nearly 37 lakh bales. Given a normal monsoon, the target of 39 lakh bales for 1952-53 is certain to be achieved.

The Bombay Mill Industry is estimated to have made a profit, subject to taxation and depreciation, of Rs. 12 crores in 1951, against Rs. 9 crores in 1950. The bonus of three months' basic wages therefore works out to 25 per cent on an year's earnings, whereas it worked out to 15 per cent on 10 months' earnings in 1950. The fact that the bonus offer was accepted (without the intervention of the Industrial Court and by a voluntary agreement) shows that the workers have also become reasonable. Similarly, in Ahmedabad also, mill labour has agreed to submit all disputes to arbitration, without fighting out claims in the Courts. This makes a new and happy era in industrial relations. It is perhaps a happy coincidence that the 48-hour week will be resumed in Bombay, while in Ahmedabad about 8 mills will start night shifts. The latest revision of cloth prices has caused this move, some millowners being said to be anxious to exhaust stocks of Egyptian cotton (which were acquired at high prices) as early as possible.

All in all, therefore, the Cotton Textile Industry seems to be placed now on sounder moorings, from every point of view, than in any previous year. When such is the case, it is understandable that Government should have decided not to decontrol cloth and yarn. With the various modifications and relaxations introduced after March 1952, control has turned out to be a flexible mechanism which can be used effectively for the good of all sections of the industry, not least the consumer.

While it has not been possible to present a complete picture of the industry from all angles, we must state that we have made an earnest endeavour to present the lights and shades of the picture of both raw cotton and the industry, as truly and objectively as possible. We trust that readers will find the account of interest and our suggestions worth a thought.

We would like to invite the attention of the readers to the earlier portion of the *Annual* entitled "Cotton Industry At a Glance" containing various up-to-date statistical tables. We have also given the text of the important Government Control Acts in relation to Cotton and Cotton Textiles, and an up-to-date note on new industries auxiliary to the Cotton Textile Industry. We have also given an up-to-date list of members of the various committees associated with Cotton Textiles and Cotton Controls.

We have also discussed at considerable length the principal problems relating to cultivation, export, import, consumption and prices of raw cotton, in Appendix "A", in the belief that it would be of considerable use to students of Commerce who have to study the subject as part of the B.Com. course.

We have also appended a fully revised list of mills, with names of agents and addresses, and have furnished full information in regard to looms, spindles, cotton consumed, average number of hands employed, etc. Cotton Mills in Pakistan have been shown separately. At the end a comprehensive table is given, showing the progress of cotton mills in India since 1909.

We would like to invite readers' attention particularly to tables 19, 20, 21 and 22 on pages xv and xvi, which have been specially prepared for the first time. A look at these tables will show at a glance the changes in the trends of production of yarn and cloth during the last four years, and will show how there has been a progressive tendency to "go fine", lured perhaps by the price factor, as by the ready sales of cloth manufactured from foreign long-staple cotton. Table No. 21 also shows the average yardage per pound for different varieties of cloth. Table No. 22 also shows the comparative changes of increase or decrease of prices of cloth since the introduction of control in December 1943, till date, as also the rates of increase or decrease therein. We are sure this authoritative information will prove useful to any student of the industry.

We take this opportunity of thanking Mr. T. Swaminathan, I.C.S., Textile Commissioner, Bombay, for the great willingness with which he has helped us, himself and through his various departments, in supplying and verifying various detailed statistics put forward in the *Annual*. We take it that such willing help is an appreciation of the utility of this *Annual* both to the Government and the general public.

I am grateful to Shri Morarji Desai, Chief Minister, Government of Bombay, for his goodness, in writing a foreword to this publication in the midst of his multifarious duties.

We expected to be able to bring out this *Annual* a little earlier, but the recent changes in the policy of the Government, particularly in relation to export, made us wait a little while, in order to enable us to pass under review some of the important measures recently adopted by Government. We trust that the readers will appreciate this. We will greatly appreciate suggestions from readers in enhancing the utility of this *Annual* to the commercial and industrial community, universities and their research departments, officials and non-officials, Members of the Central and State Legislatures, and the general public interested in the study of the vicissitudes of this largest national industry of the country.

C/o M. P. Gandhi & Co. (Publishers),
Jan Mansion,
Sir Pherozshah Mehta Road,
Fort, Bombay 1.
1st August 1952.

M. P. GANDHI,
Editor, Cotton Textile
Industry *Annual*.

The Present trend of production of cloth, in percentages, of the various categories during the last 4 years is given below:

	1948	1949	1950	1951
Coarse	18	12	11	9
Medium	60	59	49	51
Fine	14	20	33	33
Superfine	8	9	7	7

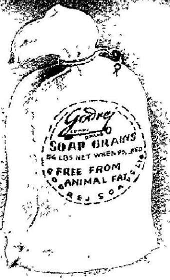
This will interest you

INDIA'S PLACE IN WORLD'S CLOTH PRODUCTION, AND WORLD'S EXPORT TRADE (1951)

		Million Sq. Yds.			*Million Sq. Yds.*
World's Total Production	...	39,060	World's Total Export	...	5,400
U.S.A.	...	29.4%	Japan	...	19.4%
INDIA	...	10.5%	U.K.	...	16.0%
Germany	...	6.7%	U.S.A.	...	14.0%
U.K.	...	6.2%	INDIA	...	13.7%
Japan	...	5.8%	France	...	7.4%
France	...	5.4%	Italy	...	6.0%
			Germany	...	3.4%

JAPAN'S CLOTH PRODUCTION

		(*Million Sq. Yds.*)
1947	...	6.6
1948	...	9.2
1949	..	9.8
1950	...	15.2
1951	..	20.3



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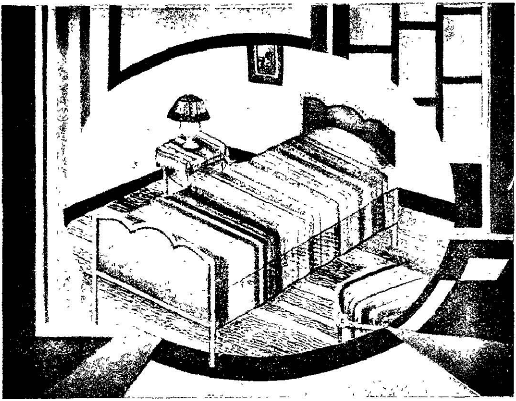

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2. Government Silk Institute, Nathnagar, Bhagalpur.
3. Wool Emporium, Gulzarbagh.
4. The Bihar Investment Trust, Muradpur & Newmarket, Patna.
5. Messrs. S. P. Sinha & Sons, Jamshedpur.
6. Messrs. Guptajee, Connaught Place, New Delhi.

THE COTTON INDUSTRY AT A GLANCE (1951-52)

NOTE.—Due to the delay in the publication of official statistics, we have experienced some difficulty in giving the latest figures in many instances. An attempt is, however, made to furnish such authoritative figures compiled from various official and reliable non-official sources. We have added some new statistics in this *Annual.*

TABLE No. 1

Progress of Cotton Mills in India from 1941 to 1951

Year ending 31st August	Number of Mills	Number of spindles installed	Number of Looms installed	Average No. of hands employed	Approximate quantity of cotton consumed (Bales of 392 lbs.)
		(Figures in thousands)			
1941	390	9,961	1,99	4,60	4,251
1942	396	10,026	2,00	4,80	4,740
1943	401	10,130	2,01	5,03	4,890
1944	405	10,197	2,02	5,04	4,843
1945	417	10,238	2,02	5,10	4,909
1946	421	10,305	2,03	4,95	4,550
1947	423	10,354	2,03	4,88	3,972
1948 (union)	408	10,266	1,97	4,66	4,200
1949 do.	416	10,534	1,98	4,63	4,325
1950 do.	425	10,849	2,00	4,34	3,789
1951 do.	445	11,241	2,01	4,25	3,687
		PAKISTAN ONLY (Actual No.)			
1948	14	167,224	4,603	9,668	82,804
1949	14	169,652	4,601	10,608	81,374
1950	14	170,327	4,601	10,974	77,472
1951	27	336,810	5,562	11,538	87,136

TABLE No. 2

Indian Cotton Crop (Acreage and Yield) from 1941 to 1951-52

Season	Area in thousands of acres	Estimated Yield in thousands of bales of 400 lbs. each	Jarilla average price per candy of 784 lbs.	Estimated approximate money value of crop in lakhs of Rs.
1941–42	24,151	6,223	201*	49,75
1942–43	19,203	4,702	458	67,00
1943–44	21,086	5,259	451	89,00
1944–45	14,843	3,580	436	64,75
1945–46	14,668	3,530	448	75,25
1946–47	14,860	3,566	456	89,75
1947–48†	10,932	2,116	545	77,50
1948–49†	11,293	1.767	—	—
1949–50†	11,793	2,165	—	—
1950–51†	13,466	3,332	865	—
1951–52†	15,125	3,600‡	820	(‡ as estimated on 31-1-52)

* Average Broach price. † (Indian Union).

TABLE No. 3

Imports of Raw Cotton into India (1941 to 1951)

Year (April-March)	From U.S.A. Quantity Tons	Value in 000's Rs.	From Egypt Quantity Tons	Value in 000's Rs.	From Kenya Quantity Tons	Value in 000's Rs.	Total Quantity in Tons	Total Value in 000's Rs.
1941–42	201	220	34,026	41,761	62,676	64,627	137,548	153,442
1942–43	2	2	36,329	75,005	24,515	33,275	87,575	154,248
1943–44	—	—	43,431	102,067	10,860	24,161	76,102	175,276
1944–45	—	—	49,659	150,569	30,490	67,901	89,717	240,061
1945–46	245	712	38,783	122,279	37,581	83,890	86,009	228,665
1946–47	3,737	9,233	43,575	134,122	30,875	69,520	98,997	259,167
1947–48	626	1,772	59,589	189,535	31,252	72,056	112,894	311,717
1948–49	4,138	18,649	51,262	288,435	21,782	81,068	161,702	642,314
1949–50	3,964	15,298	76,246	340,620	35,647	137,409	158,642	632,460
1950–51	100,858	405,648	49,231	323,539	41,201	163,794	214,886	1,007,627

TABLE No. 4

Exports of Indian Raw Cotton to other Countries (1941 to 1951)

Year (April-March)	U.K. Quantity Tons	U.K. Value in 000's Rs.	Japan Quantity Tons	Japan Value in 000's Rs.	Total Quantity Tons	Total Value in 000's Rs.
1941-42	97,747	64,660	68,672	40,008	256,111	1,59,464
1942-43	40,943	26,262	—	—	53,720	36,420
1943-44	32,131	43,462	—	—	50,281	63,635
1944-45	41,726	56,511	—	—	56,918	69,338
1945-46	39,006	47,380	—	—	135,945	1,39,156
1946-47	19,065	25,065	—	—	162,718	2,25,422
1947-48	29,784	42,741	—	—	209,307	2,47,529
1948-49	7,783	12,925	13,966	32,648	76,080	1,40,012
1949-50	1,395	2,573	17,438	36,765	57,694	1,05,995
1950-51	3,865	13,135	1,356	3,098	14,663	49,441

TABLE No. 5

Yearly Mill Consumption of Cotton in India by Varieties (1941 to 1951)

[All figures in 000's of bales regardless of weight.]

Year ending		Indian	American	Egyptian	Sundries	Total
31st July	1941	3,591	75	68	303	3,837
" "	1942	3,842	27	88	436	4,393
" "	1943	4,107	27	82	324	4,540
" "	1944	4,091	Nil	184	315	4,590
" "	1945	4,159	6	155	398	4,718
" "	1946	4,495	12	141	372	5,020
" "	1947	3,162	5	154	377	3,698
" "	1948	3,456	2	177	318	3,953
" "	1949	3,547	7	216	280	4,050
" "	1950	2,587	111	239	334	3,271
" "	1951	2,317	383	175	310	3,185

TABLE No. 6

Consumption of INDIAN Cotton in the Various Provinces of British India and Indian States during the last 6 years upto 1949-50

(Based on returns made under the Indian Cotton Cess Act.)
(Figures in thousand bales of 400 lbs.—September-August.)

	1943-44	1944-45	1945-46	1946-47	(Union of India)* 1947-48	1948-49	1949-50
Bombay Island ...	1,199	1,224	1,124	842	1,006	798	1,005
Ahmedabad ...	429	402	383	296	390	361	539
Bombay Presidency	1,907	1,911	1,769	1,366	1,644	1,477	1,864
Madras Presidency ...	597	604	566	455	508	516	596
United Provinces ...	414	411	369	300	343	251	278
C.P. & Berar ...	148	170	156	142	158	150	155
West Bengal ...	138	136	129	101	111	87	100‡
Punjab ...	183	181	168	144	90	13	14
Bihar ...	—	—	—	—	—	4*	—*
Rest of India ...	52	52	54	50	47	128	164
Total of India ...	3,438	3,465	3,211	2,558	2,986	2,626	3,171
Total of Indian States	678	695	660	594	670	526	550
Total for India ...	4,116	4,160	3,871	3,152	3,571	3,152†	3,721

* This figure is for Part "C" States and includes Ajmer, Kutch, Bhopal and Delhi. Delhi was taken along with Punjab upto 1947-48.

† Bales of 392 lbs. ‡ Includes Bihar also.

TABLE No. 7

Imports of Cotton Twist and Yarn into India (1939 to 1950-51)

(000's omitted)

Year, (April-March)	U.K. Quantity lbs.	U.K. Value Rs.	Japan Quantity lbs.	Japan Value Rs.	Total (all countries) Quantity lbs.	Total (all countries) Value Rs.
1939-40	2,829	3,164	27,164	24,211	41,132	35,196
1940-41	1,297	1,963	11,822	13,484	19,334	21,795
1941-42	370	848	4,207	7,283	8,173	12,405
1942-43	60	141	...	...	945	1,632
1943-44	66	136	...	...	630	1,185
1944-45	45	121	...	...	192	402
1945-46	123	368	...	...	123	368
1946-47 (Union)	151	649	...	...	217	918
1947-48	2,413	9,998	25	67	8,791	30,873
1948-49	5,461	25,220	2,660	8,496	11,071	44,976
1949-50	6,046	29,806	5,371	19,015	14,089	57,686
1950-51	224	1,172	...	...	500	3,033

TABLE No. 8

Imports of Cotton Manufactures into India (1939 to 1950-51)

(000's omitted)

Year (April-March)	U.K. Quantity Yds.	U.K. Value Rs.	Japan Quantity Yds.	Japan Value Rs.	Total (all countries) Quantity Yds.	Total (all countries) Value Rs.
1939-40	144,562	36,165	393,373	51,276	579,002	96,493
1940-41	56,146	19,347	368,086	56,569	446,976	80,818
1941-42	31,213	15,416	135,684	24,858	181,539	44,531
1942-43	11,764	7,275	...	...	15,759	8,838
1943-44	3,275	2,072	...	...	3,730	2,418
1944-45	4,866	3,074	...	...	5,205	2,228
1945-46	2,639	3,300	...	...	3,184	4,313
1946-47	6,909	10,178	...	...	16,150	23,887
1947-48 (Union)	10,571	19,766	...	...	26,537	42,405
1948-49	37,062	77,246	1,388	1,096	44,921	90,965
1949-50	40,026	79,316	29,638	19,651	73,075	1,06,748
1950-51	3,362	8,005	117	65	5,734	13,041

TABLE No. 9

Exports of Cotton Twist and Yarn, and Cotton Piecegoods from India (1939 to 1950-51)

(000's omitted)

Year (April-March)	Twist and Yarn Quantity lbs.	Twist and Yarn Value Rs.	Piecegoods Quantity Yds.	Piecegoods Value Rs.
1939-40	36,943	17,939	221,405	61,142
1940-41	77,723	40,912	390,144	106,432
1941-42	90,529	73,783	772,355	265,133
1942-43	34,210	38,175	817,991	387,565
1943-44	18,937	31,487	461,337	364,920
1944-45	16,918	22,808	423,021	337,930
1945-46	14,497	14,805	440,510	295,187
1946-47	3,791	4,418	318,019	249,247
1947-48 (Union)	42	56	192,422	180,276
1948-49	7,408	12,893	340,865	362,388
1949-50	62,293	112,972	689,973	575,883
1950-51	74,462	170,682	1,209,885	1,057,915

TABLE No. 10

Quantities of Yarn Spun and Woven Goods manufactured in Indian Mills (1940 to 1950-51)

(000's omitted)

Year (April-March)	Yarn lbs.	Piecegoods Yds.
1940-41	1,349,038	4,269,475
1941-42	1,577,177	4,493,613
1942-43	1,533,796	4,109,337
1943-44	1,680,463	4,870,687
1944-45	1,650,925	4,726,472
1945-46	1,614,817	4,675,634
1946-47	1,222,000	3,863,932
1947-48 (Union of India)	1,329,779	3,770,017
1948-49 „	1,475,193	4,380,384
1949-50 „	1,290,338	3,850,364
1950-51 „	1,161,885	3,675,359

TABLE No. 11

Changes in Customs Tariff on Cotton Yarn & Piecegoods in India since 1894 *

Yarn (upto 31-3-1952)

All counts	Date		Tariff Rates
From 10th March,	1894 to 26th Dec.,	1894 ...	Free
„ 27th Dec.,	1894 to 2nd Feb,	1896 ...	5 p.c. *ad valorem.*
„ 3rd Feb.,	1896 to 28th Feb.,	1922 ...	Free
„ 1st March,	1922 to 21st Sept.,	1927 ...	4 p.c. *ad valorem.*
„ 22nd Sept.,	1927 to 29th Sept.,	1931 ...	5 p.c. *ad valorem* or $1\frac{1}{2}$ as. per lb. whichever is higher.
„ 30th Sept.,	1931 to 30th April,	1934 ...	$6\frac{1}{4}$ p.c. *ad valorem* or $1\frac{7}{8}$ as. per lb. whichever is higher.

From 1st May, 1934:—(Effective upto 31st March, 1952).

Schedule No. 47(6)

Counts 50s and below:—

(i)	British Manufacture ...	5 p.c. *ad valorem* or $1\frac{1}{2}$ as. per lb. whichever is higher plus 1/4 th of the total duty.
(ii)	Not of British Manufacture ...	$6\frac{1}{4}$ p.c. *ad valorem* or $1\frac{7}{8}$ as. per lb. whichever is higher plus 1/4th of the total duty.

Counts above 50s:—

(i)	British Manufacture ...	$6\frac{1}{4}$ p. c. *ad valorem.*
(ii)	Not of British Manufacture ...	7 13/16 p. c. *ad valorem.*

COTTON PIECEGOODS (upto 31-3-1949)

Date			Tariff Rates
From 10th March,	1894 to 26th Dec.,	1894 ...	Free
„ 27th Dec.,	1894 to 2nd Feb.,	1896 ...	5 p.c. *ad valorem.*
„ 3rd Feb.,	1896 to 6th March,	1917 ...	$3\frac{1}{2}$ p.c. *ad valorem.*
„ 7th March,	1917 to 28th Feb.,	1921 ...	$7\frac{1}{2}$ p.c. *ad valorem.*
„ 1st March,	1921 to 3rd April,	1930 ...	11 p.c. *ad valorem.*

* An excise duty was imposed on cotton piecegoods woven in Indian mills at the rate of $3\frac{1}{2}$ per cent *ad valorem* from 1896. This excise duty was suspended in December 1925, and abolished in 1926. Imposed again from 1st March 1949 (pp. xviii).

Changed Classification. *(From 4th April 1930)*

Date		PLAIN GREY						OTHERS	
		British *ad valorem* As.			Foreign *ad valorem* As.			British	Foreign
		%		per lb.	%		per lb.	*ad valorem* %	
		(whichever is higher)			(whichever is higher)				
4th April	1930	15	or	$3\frac{1}{2}$	20	or	$3\frac{1}{2}$	15	20
1st March	1931	20	or	$3\frac{1}{2}$	25	or	$3\frac{1}{2}$	20	26
30th Sept.	1931	25	or	$4\frac{3}{8}$	31	or	$4\frac{3}{8}$	25	$31\frac{1}{4}$
30th Aug.	1932	25	or	$4\frac{3}{8}$	50	or	$5\frac{1}{4}$	25	50
7th June	1933	25	or	$4\frac{3}{8}$	75	or	$6\frac{3}{4}$	25	75
8th Jan.	1934	25	or	$4\frac{3}{8}$	50	or	$5\frac{1}{2}$	25	50
1st May	1934	25	or	$4\frac{3}{8}$	50	or	$5\frac{1}{4}$	25	50

POSITION SINCE 1936

Under Government of India Notification No. 341-T(10)/36, dated the 25th June 1936, protective duties on cotton piecegoods were amended as under :—

Cotton fabrics, not otherwise specified, containing more than 50 per cent of Cotton :—

(i) Grey piecegoods (excluding borderd grey chadars, dhoties, saris and scarves)—

Of British Manufacture ... 15 p.c. *ad valorem* or $2\frac{5}{8}$ as. per lb. whichever is higher plus one-fourth of the total duty.

Not of British Manufacture ... 50 p.c. *ad valorem* or $5\frac{1}{4}$ as. per lb. whichever is higher plus one-fourth of the total duty.

(ii) Cotton piecegoods and fabrics not otherwise specified—

Of British Manufacture ... $18\frac{3}{4}$ p.c. *ad valorem.*

Not of British Manufacture ... $62\frac{1}{2}$ p.c. *ad valorem.*

TABLE No. 12

Customs Duty in force upto December 1952

Item No.	Name of Article. TEXTILE MATERIALS AND TEXTILE GOODS—	Standard rate of duty	Preferential rate of duty if the article is the produce or manufacture of Burma.
(1)	(2)	(3)	(4)
48(1)	Fabrics, not otherwise specified, containing more than 90 per cent of artificial silk—		$23\frac{1}{4}$ per cent *ad valorem*
	(*a*) of British manufacture ...	30 per cent *ad valorem* or $2\frac{1}{2}$ annas per square yard, whichever is higher plus 55 per cent of the total duty.	
	(*b*) not of British manufacture* ...	50 per cent *ad valorem* or 4 annas per square yard, whichever is higher plus 55 per cent of the total duty.	

* Under Government of India, Commerce Department, Notification No. 341-T.(6)/41, dated the 21st July 1941, the articles assessable under this sub-item are liable to duty at 50 per cent *ad valorem* or 7 annas per square yard, whichever is higher plus 55 per cent of the total duty.

TABLE No. 12—Contd.

(1)	(2)	(3)	(4)
48(3)	Cotton Fabrics, not otherwise specified, containing more than 90 per cent of cotton—		6¼ per cent *ad valorem*
	(a) Grey piecegoods (excluding bordered grey chadars, dhoties, saris and scarves) :—		
	(i) of British manufacture[1] ...	15 per cent *ad valorem* or 2.5/8 annas per lb., whichever is higher plus one-fourth of the total duty.	
	(ii) not of British manufacture	50 per cent *ad valorem* or 5¼ annas per lb., whichever is higher plus one-fourth of the total duty.	
	(b) Printed piecegoods and printed fabrics—		
	(i) of British manufacture[2] ...	21⅛ per cent *ad valorem*.	
	(ii) not of British manufacture	62½ per cent *ad valorem*.	
	(c) Cotton piecegoods and fabrics, not otherwise specified—		
	(i) of British manufacture[3] ...	18¾ per cent *ad valorem*.	
	(ii) not of British manufacture	62½ per cent *ad valorem*.	
48(5)	Fabrics, not otherwise specified, containing not more than 10 per cent silk but more than 10 per cent and not more than 90 per cent artificial silk—		23¼ per cent *ad valorem*
	(a) containing 50 per cent or more cotton—		
	(i) of British manufacture ...	30 per cent *ad valorem* or 2 annas per square yard, whichever is higher plus 55 per cent of the total duty.	
	(ii) not of British manufacture[4]	50 per cent *ad valorem* or 3¼ annas per square yard, whichever is higher plus 55 per cent of the total duty.	
	(b) containing no cotton or containing less than 50 per cent cotton.—		
	(i) of British manufacture ...	30 per cent *ad valorem* or 2½ annas per square yard, whichever is higher plus 55 per cent of the total duty.	
	(ii) not of British manufacture[5]	50 per cent *ad valorem* or 4 annas per square yard, whichever is higher plus 55 per cent of the total duty.	
48(9)	The following cotton fabrics, namely Sateens including Italians of Sateen weave, velvets and velveteens and embroidered all-overs—		6 per cent *ad valorem*
	(a) Printed fabrics—		
	(i) of British manufacture[2]	21⅛ per cent *ad valorem*.	
	(ii) not of British manufacture	43¾ per cent *ad valorem*.	
	(b) Other fabrics—		
	(i) of British manufacture[3]	18¾ per cent *ad valorem*.	
	(ii) not of British manufacture	43¾ per cent *ad valorem*.	

[1] Under Government of India, Commerce Department, notification No. 20-T.(17)/39, dated the 16th April 1940, the articles assessable under this sub-item are liable to duty at 12½ per cent *ad valorem* or 2.3/16 annas per lb., whichever is higher plus one-fifth of the total duty.

[2] Under Government of India, Commerce Department, Notification No. 20-T.(17)/39, dated the 16th April 1940, the articles assessable under this sub-item are liable to duty at 18 per cent *ad valorem*.

[3] Under Government of India, Commerce Department, Notification No. 20-T.(17)/39, dated the 16th April 1940, the articles assessable under this sub-section are liable to duty at 15 per cent *ad valorem*.

[4] Under Government of India, Commerce Department, Notification No. 341-T.(6)/41, dated the 21st July 1941, the articles assessable under this sub-item are liable to duty at 50 per cent *ad valorem* or 5½ annas per square yard, whichever is higher plus one-fifth of the total duty.

[5] Under Government of India, Commerce Department, Notification No. 341-T.(6)/41, dated the 21st July 1941, the articles assessable under this sub-item are liable to duty at 50 per cent *ad valorem* or 7 annas per square yard, whichever is higher plus one-fifth of the total duty.

NOTE.—Protective duties were discontinued with effect from 1st April 1947, and the same were converted into revenue duties.

TABLE No. 13

Total Production of Mill-made Cotton Cloth and Yarn in INDIA for 14 Calendar Years from 1938 to 1951

(000's omitted)

Period	TOTAL ALL-INDIA MILL PRODUCTION		
	Yarn	Cloth	
	Lbs.	Lbs.	Yds.
1938	1,286,035	920,834	4,303,879
1939	1,264,010	899,661	4,113,547
1940	1,274,515	921,773	4,091,446
1941	1,537,811	1,087,138	4,530,678
1942	1,528,784	1,041,419	4,024,373
1943	1,670,075	1,175,137	4,715,255
1944	1,622,923	1,186,839	4,811,357
1945	1,625,351	1,179,537	4,687,589
1946	1,396,496	966,299	4,002,787
1947 (Union)	1,295,705	902,025	3,761,974
1948 (Union)	1,447,616	1,029,590	4,319,303
1949 (Union)	1,359,119	938,914	3,904,203
1950 (Union)	1,173,036	849,860	3,667,349
1951 (Union)	1,303,861	961,480	4,076,186

(As compiled by the Textile Commissioner, Bombay, from 1945 onwards)

The Production of Pakistan alone for 1948 and 1951 was as follows:

(000's omitted)

Year	No. of Mills	Working Spindles	Looms	Quantity of Yarn (approx.)	Quantity of cloth (approx.)
1948	14	167	4	30,000 lbs.	100,000 Yards
1951	27	176	4.6	...	...

TABLE No. 14

Net Imports, Available Mill Production, and Estimated Handloom Production of Cotton Piecegoods in India, along with 'per capita' Consumption from 1919-20 to 1950-51

Year (April-March)	Net Imports	Net available Mill Production (after deducting exports)	Estimated Handloom Production	Net available for Consumption	*Per Capita* available for consumption in yards
	(Quantity in crores of yards.		Crore=10 million)		
1919-20	90	144	56	299	9.34
1920-21	145	143	115	403	12.59
1921-22	102	157	119	378	11.81
1922-23	152	156	134	452	13.40
1923-24	142	154	101	397	12.03
1924-25	177	179	126	482	14.61
1925-26	153	179	118	450	13.18
1926-27	176	206	136	518	15.15
1927-28	194	219	130	543	16.60
1928-29	191	174	108	473	13.52
1929-30	190	229	138	557	15.97
1930-31	87	246	136	469	13.49
1931-32	76	288	139	503	14.28
1932-33	120	311	142	573	16.70
1933-34	77	289	124	490	14.17
1934-35	94	334	124	552	15.60
1935-36	94	350	137	581	16.57
1936-37	75	347	128	550	15.50
1937-38	58	384	149	591	16.42
1938-39	63	409	192	664	17 94
1939-40	56	379	182	617	16.67
1940-41	44	388	165	597	16.03
1941-42	18	372	160	550	14.20
1942-43	1	329	150	480	12.0
1943-44	.3	441	160	601	15.0
1944-45	.5	430	150	580	15.4
1945-46	.3	423	137	560	14.0
1946-47	1.6	354	135	490	12.2
1947-48	2.6	357	123	482	14.1
1948-49	4.7	395	117	516	15.0
1949-50	7.3	314	114	435	12.6
1950-51	0.5	261	75	336	9.7

Note.—The broad purpose of the above figures is to enable the reader to view India in the world perspective of consumption of cotton textiles. The *per capita* consumption has fallen considerably during 1949-50 and 1950-51, when it went down below 10 yards, due largely to the increasing volume of exports of cloth which were of the order of 700 million yards in 1949-50, and 1,200 million yards in 1950-51. The production of handlooms has also fallen considerably due to the extreme shortage of supplies of yarn, due partly to the increase in exports of yarn.

Since 1947-48, when Pakistan was partitioned from India, the figure of population is assumed at 340 million, and slightly higher for the subsequent years.

TABLE No. 15

Statistics of World Cotton Spindleage in Principal Countries (July 1951)

Country	No of spindles (in thousands)
U. K.	28,152
U. S. A.	33,183
France	8,035
West Germany	6,206
East "	870
U. S. S. R.	9,850
Canada	1,138
Mexico	1,114
Japan	5,244
Pakistan	315
INDIA	10,849

TABLE No. 16

Production of Yarn and Cloth in the Union of India in each Zone during 1951

(Figures in thousands)

Zones	1951		
	Yarn	Cloth	
	(lbs.)	(lbs.)	(Yds.)
Bombay:			
(a) Ahmedabad City	187,166	177,798	962,920
(b) Bombay City	364,315	317,083	1,326,688
(c) Bombay Others	116,500	93,633	435,604
Kutch	335		
Saurashtra	24,322	19,285	70,892
Madhya Bharat	82,182	72,470	247,967
Bhopal	4,542	4,654	16,477
Ajmer-Merwara	13,427	8,639	31,399
Rajasthan	15,504	10,834	33,140
Delhi	37,320	26,600	95,236
Punjab	5,905	5,278	22,283
Uttar Pradesh	109,953	83,741	309,512
Bihar	819	839	3,626
West Bengal	37,462	30,230	146,489
Madhya Pradesh	49,105	33,269	112,358
Hyderabad	24,189	20,387	64,213
Madras	188,255	35,057	119,372
Mysore	27,174	14,179	47,052
Kerala	8,195	2,945	12,051
Orissa	5,571	3,179	14,400

TABLE No. 17

Number of Mills, Looms and Spindles installed in India as on 1-1-51

ZONE	Mills	Spindles (Rings & Mules)	Looms
Bombay :			
(a) Ahmedabad City	66	1,923,168	42,041
(b) Bombay City	63	2,972,968	64,895
(c) Bombay Others	50	1,243,524	23,580
Kutch	1	......	......
Saurashtra	10	151,792	3,032
Madhya Bharat	16	414,738	10,660
Bhopal	1	15,004	400
Ajmer-Merwara	4	64,420	1,755
Rajasthan	7	92,738	1,544
Delhi	3	140,976	3,435
East Punjab	3	40,584	665
Uttar Pradesh	22	760,772	12,636
Bihar	2	29,520	746
West Bengal	21	401,390	7,642
Madhya Pradesh	11	366,552	7,218
Hyderabad	6	116,762	2,559
Madras	79	1,869,997	7,566
Mysore	8	219,416	2,655
Kerala	9	118,332	716
Orissa	1	33,404	432

AN UP-TO-DATE NOTE ON NEW INDUSTRIES AUXILIARY TO THE TEXTILE INDUSTRY (1951-52)

BOBBINS :

The total number of bobbin factories on the Textile Commissioner's records is 73. About 44 factories submit periodical returns.

Though the rated annual indigenous capacity was estimated at 5 lakhs gross, the actual production is recorded at 3,50,000 gross. The requirement of the Industry has been assessed at 3,89,291 gross per annum. The difference between the requirement and the indigenous production would, therefore, amount to about 40,000 gross. However, with a view to giving further fillip to the sale of indigenous products, a quantity of 30,000 gross bobbins has been recommended on an *ad hoc* basis for purposes of licensing during the current year (1952).

The Sub-Committee for the Development of Indigenous Production of Millstores and Accessories, constituted under the aegis of the Textile Advisory Committee, has also recommended—

(i) duty-free imports of Birch and Beech wood;

(ii) import restrictions on slubbing, roving, rabbeth bobbins and skewers; and

(iii) laying down of standards and approval of bobbin factories.

SHUTTLES :

The annual requirement of the Industry has been estimated at 7,200 gross against which the optimum indigenous production capacity has been computed at 4,500 gross.

Here again, as in the case of bobbins, a quantity of 1,800 gross only has been recommended for imports in 1952, although the gap between the demand and the production is much greater.

The Development Sub-Committee has recommended—

(i) duty-free import of Cornelwood Blocks;

(ii) import restrictions in proportion to meet the gap between the requirement and production; and

(iii) facilities for import of accessories for special type of shuttles and steel for shuttle tongues and tips.

PICKERS:

There are 73 factories on the Textile Commissioner's records out of which about 20 are sending statements periodically. Information relating to several factories is not available mainly because such units are scattered in villages and conducted by illiterate persons.

The estimated requirement of the Industry is 37,500 gross and the indigenous production is approximately 35,500 gross based on the available statistics. In order to accord impetus to the indigenous manufacturers for further stepping up their production and sales, an *ad hoc* quantity of 1,000 gross has been recommended for importation to maintain healthy competition.

The Development Sub-Committee have recommended facilities for import of Hides from Far Eastern Countries. Duty-free import of Sperm Oil was also recommended, but this has not so far been given effect to.

BUFFERS:

The annual requirement of the Industry is rated as 4,00,000 lbs. No accurate data is available as to the indigenous capacity or the production of this item of store owing to their being manufactured largely on a cottage industry basis. A quantity of 62,500 lbs. has been recommended for import.

PICKING BANDS:

Though the Industry's requirement is estimated at 6,80,000 lbs. per annum, collection of exact data regarding indigenous manufacture has not been found possible for the same reason as in the case of buffers. Recommendations have been made for the import of 2,25,000 lbs. for the year 1952, besides allowing import of adequate quantities of suitable hides for the manufacture of this item.

ROLLER SKINS:

The annual requirement is being reckoned at 42,000 doz. against the estimated indigenous production of 28,000 doz. Imports are being permitted to the extent of 14,000 doz. during the current year.

COTTON HEALDS, WIRE HEALDS AND STEEL REEDS:

Set forth below is a statement indicating the requirement, the indigenous production and the imports recommended for these items of millstores for the year 1952. With regard to the quantum allowed for imports it should be borne in mind that they represent only *ad hoc* figures fixed with a view to accelerate sales of indigenous products:—

	Total annual requirement.	Rated indigenous production.	Imports recommended.
Cotton Healds ...	8.5 lakhs sets	6.5 lakhs sets	1,50,000 sets
Wire Healds ...	60,000 bundles of 1,000 each	30,000 bundles	15,000 bundles
Steel Reeds ...	4,00,000 pcs.	2,00,000 pcs.	1,00,000 pcs.

LEATHER BELTING:

While the estimated requirement is 425 tons of various sizes of leather beltings, the rated annual indigenous capacity is estimated at 300 tons. The annual indigenous production works out at about 250 tons. The Development Sub-Committee recommended that imports of beltings above the size 1¾" only should be permitted, as sizes upto this in satisfactory quality are being manufactured in India. The quality of indigenous belting tested at Alipore Government Test House is found to be below British Standard Specification.

COTTON ROPES AND BANDINGS:

The Textile Industry's annual requirement is estimated at 27 lakh lbs. The indigenous capacity is capable of producing to the tone of about 58 lakh lbs. per year. The existing ban on imports is recommended to be continued. Owing to an overall shortage of yarn in the country, the Textile Commissioner has been releasing for this Industry about 300 bales of yarn per month.

SPINDLE TAPES:

The annual requirement is estimated at 1 lakh gross yards as against the indigenous capacity of about 2.39 lakh gross yards.

Due to shortage of suitable yarn, imports to the tune of 50,000 gross yards have been recommended. The Textile Commissioner has been releasing about 64 bales of yarn in suitable counts per month.

STARCH:

There are 24 starch factories in India with an annual productive capacity of 59,286 tons of starch as per list attached. Out of the 24, only 11 factories are working at present on maize grain imported from the U.S.A. and Burma.

Most of the factories were idle since 1947 as no maize grain could be allotted to them for manufacture of starch due to adverse food situation in the country. During 1950, only about 910 tons of starch were produced from deteriorated cereals unfit for human consumption which were released to the factories. In 1951 8,533 tons of starch were produced from imported maize grain.

Annual requirements of all kinds of starch (including sago flour and tamarind seed kernel powder) are estimated to be 45,000 tons for the textile industry.

At present, the textile mills are not permitted to use more than 20 per cent sizing on the weight of the cloth.

Customs Duty on Import of RAW COTTON (1951)

Duty imposed on 31st March 1931, @ 0-0-6 per lb.

Increased Duty from 31st March 1939, @ 0-1-0 per lb.

Increased Duty from 29th January 1942, @ 0-2-0 per lb.

The Cotton Fund Ordinance under which the duty was levied was repealed by Clause 8 of the Indian Finance Act, 1946, but the duty was amalgamated into a consolidated duty of two annas a pound without any surcharge, which will be leviable only under the Indian Tariff Act.

Thus, present duty is @ 0-2-0 per lb. with a surcharge of 5 per cent with effect from 1st March 1951.

A refund has been granted on the import duty as from 1st February 1950, on the cotton contained in fine and superfine cloth actually exported out of India, at a flat rate of 2 annas per pound on the net weight of the cloth. No refund of customs import duty is, however, granted on cotton contained in medium and coarse cloth. Likewise, no refund of import duty is admissible on Pakistan cotton (if any) contained in fine and superfine cloth.

Customs Duty on Export of COTTON CLOTH and YARN

A Customs Duty at 3 per cent was imposed on all cloth and yarn manufactured in India and exported from British India at the rate of 3 per cent of the maximum ex-factory price, with effect from 1st February 1945. It also applied to handloom cloth. This duty which was levied under Cotton Textiles Fund Ordinance till 1947, was superseded by a revenue duty of 4 as. per sq. yd. on cloth and 6 as. per lb. on cotton yarn exported from India as provided in the supplementary budget introduced by the Finance Minister in the Constituent Assembly (Legislative), India, on 26th November 1947. The duty was subsequently converted into an *ad valorem* duty of 25 per cent on cloth. Handloom cloth, and cotton yarn was exempted from payment of duty from 1st March 1948 under the Indian Finance Act, 1948.

Early in November 1948, the export duty on cloth was reduced to 10 per cent *ad valorem*, and from 1st June 1949, the duty was abolished altogether, in order to stimulate exports.

From 1st March 1951, an export duty of 10 per cent *ad valorem* was imposed on export of medium and coarse cloth made mostly out of Indian cotton. The revenue estimate is Rs. 2.5 crores.

Export Duty on RAW COTTON (reduced in 1952)

On 26th October 1946, the Government of India issued an Ordinance amending the Indian Tariff Act, by which Government was empowered to impose an export duty on raw cotton at such rate, not exceeding seventy-five rupees per bale of 400 lbs., as they may, by notification, in the official *Gazette*, from time to time, determine. By a notification, dated the 26th October 1946, Government fixed the rate of duty at Rs. 20 per bale of 400 lbs which came into force from the date of notification i.e. 26th October 1946. This duty was increased by Government to Rs. 40 per bale of 400 lbs. in January 1948.

The duty on export of raw cotton was further enhanced to Rs. 100 per bale of 400 lbs. as from 1st February 1949. A further increase in the duty was made to Rs. 400 per bale of 400 lbs. with effect from 8th November 1950.

The export duty was reduced to Rs. 200 per bale of 400 lbs. with effect from 16th March 1952.

Cess on RAW COTTON

A cess at the rate of as. 4 per bale was imposed, with effect from September 1949, on cotton produced in India, and either exported from any customs port to any port outside India or consumed in any mill in India. The yield of the cess is expected to be about Rs. 9 lakhs per year. These funds are for the Indian Central Cotton Committee.

Excise Duty on CLOTH

By an Ordinance promulgated by the Government of India, on *1st January 1949*, amending the Central Excises and Salt Act, 1944, an excise duty of 25 per cent *ad valorem* of ex-mill price was levied with effect from the date of the Ordinance, on superfine cloth, i.e. cloth in which the count of warp yarn (whether single or folded) is 48s or finer. The Indian Finance Act, 1949, extended the duty with effect from *1st March 1949*, to the fine, medium and coarse varieties of cloth—the rate of duty being 6¼ per cent *ad valorem* in respect of fine cloth, and at Re. 0-0-3 per yard in case of coarse and medium cloths.

The position of Excise duties (in September 1949) was as follows:—

Superfine cloth—25% of ex-mill price.

Fine cloth—6¼% of ex-mill price.

Medium and Coarse cloth—Re. 0-0-3 per yard.

Revised Excise Duties on Cloth from 1950

These excise duties were revised from 1st February 1950, as follows:—

Superfine cloth—20% of ex-mill price.

Fine cloth—5% of ex-mill price.

Medium and Coarse cloth—Re. 0-0-3 per yard.

Alternative Excise Duties on Fine and Superfine Cloth from 9th May 1952

As actual sale prices have often been less than the stamped prices, Government have imposed specific duties as follows, in place of *ad valorem* duties, from 9th May 1952. Whatever duty is less will apply.

Grey and bleached	— 7 pies per yard;	or 5% *ad valoren*, whichever is less.
Dyed and printed	— 9 pies per yard;	
All other varieties:—		
Grey and bleached	— 11 pies per yard;	
Dyed and printed	— 1 anna per yard;	
Superfine cloth:—		
Grey and bleached, all varieties	— 3 annas per yard;	or 20% *ad valorem*, whichever is less.
Dyed and printed, all varieties	— 3½ annas per yard;	

Powerloom and handloom cloth is exempt from this duty.

5 per cent Surcharge on Imports of Cloth and Yarn

From 1st March 1951, a surcharge of 5% was imposed on all imports. This surcharge will also apply to imports of cloth and yarn.

TABLE No. 18

Estimated per capita Consumption of Cotton Piecegoods in India in 1947-48, 1948-49, 1949-50, 1950-51 and 1951-52

(In million yards)

—	1947-48	1948-49	1949-50	1950-51	1951-52
Net available Mill Production (after deducting exports)	3,578	3,958	3,140	2,610	4,076
Estimated Handloom Production ...	1,230	1,170	1,140	750	1,300
Estimated Hand Woven Cloth from Handspun Yarn	100	100	100	100	100
Net Import of Cotton Piecegoods ...	26	44	73	5	50
Net Quantity of Cotton Piecegoods available for consumption ...	4,934	5,272	5,453	3,365	5,526
Estimated *per capita* consumption of Cotton Piecegoods	14.1	15.0*	12.6	9.7	12

* The previous year's figures were for the Union of India. The figures from 1948-49 are for India only and the *per capita* consumption is estimated on the basis of a population of 34 crores, with suitable addition every year.

TABLE No. 19

Production of Cloth of different varieties for the calendar years 1948 to 1951

(Figures in thousand yds.)

Year	Total production	Coarse	% of 3 to 2	Medium	% of 5 to 2	Fine	% of 7 to 2	Super-fine	% of 9 to 2
1	2	3	4	5	6	7	8	9	10
1948 ...	4,319,303	797,620	18.5	2,580,567	59.73	601,429	13.90	339,687	7.87
1949 ...	3,904,203	452,068	11.58	2,309,169	59.14	809,240	20.73	333,726	8.55
1950 ...	3,665,091	421,819	11.51	1,781,436	48.61	1,200,453	32.75	261,383	7.13
1951 ...	4,076,186	363,516	8.92	2,080,858	51.05	1,347,946	33.07	283,866	6.96

TABLE No. 20

Production of Yarn in various count groups for the calendar years 1948-1951

(In thousand lbs.)

Year	Upto and including 20s	% of 2 to 8	Above 20s & including 40s	% of 4 to 8	Above 40s	% of 6 to 8	Total
1	2	3	4	5	6	7	8
1948 ...	974,156	67.3	371,316	25.65	102,144	7.05	1,447,616
1949 ...	844,562	62.14	389,771	28.68	124,786	9.18	1,359,119
1950 ...	660,464	56 24	392,821	33.46	120,935	10.3	1,174,220
1951 ...	719,094	55.15	451,835	34.65	132,932	10.2	1,303,861

TABLE No. 21

Average yardage per lb. of cloth of different varieties for the calendar years 1949 to 1951

Year	Average yardage per lb.				
	Total	Coarse Upto 17s	Medium 17s to 36s	Fine 36s to 48s	Superfine 48s and above.
1	2	3	4	5	6
1948	4.4	2.9	4.2	6.2	8.4
1949	4.2	2.7	3.9	5.8	7.7
1950	4.3	2.7	3.9	5.9	8.5
1951	4 2	2.6	3.8	5.6	8.3

TABLE No. 22

(a) The different changes of increase or decrease of prices of cloth since the introduction of Cloth Control in 1943 till date and the rates of increase or decrease thereon :—

(Percentages)

Period of Price Fixation (for goods packed after)	Average increase (+) or decrease (—) over the preceding period			
	Coarse	Medium	Fine	Superfine
December, 1943	—Control on prices was introduced—			
28th February, 1944	—9.375	—9.375	—9.375	—9 375
31st May, 1944	—9.375	—9.375	—9.375	—9.375
31st August, 1944	—6.25	—6.25	—6 25	—6.25
30th November, 1944	—5.00	—5.00	—5.00	—5.00
31st January, 1945	—5.00	—5.00	—5.00	—5.00
31st October, 1945	—5.00	—5.00	—5.00	—5.00
31st January, 1946	Nil	Nil	Nil	Nil
	Voluntary Control from 20th January, 1948 to 23rd April, 1948. The Control was lifted then.			
31st July, 1948	—Control was re-introduced—			
	+48 65***	+40.19	+39.35	+45.57
31st December, 1948	— 1.57	— 2.75	— 8.17	—10.39
31st March, 1949	+ 5.45	+ 3.13	+ 3.72	+ 5.07
30th June, 1949	— 0.97	— 0.66	Nil	— 7.13
31st October, 1949	Nil**	Nil	Nil	Nil
31st January, 1950	Nil	— 2.55	+ 1.92	+ 4.06
30th April, 1950	Nil	Nil	+ 1.39	— 2.85
31st July, 1950	Nil	Nil	+ 1.24	— 0.76
31st October, 1950	Nil	Nil	Nil	+18 46
1st January, 1951	+11.91	— 1.74	+16.42	+ 6.43
31st January, 1951	+16.49*	+ 5.64	+16.42	+ 6.43
31st March, 1951	+ 3.82	+ 3.86	+ 7.68	+33.84
30th June, 1951	Nil	Nil	— 1.17	—12.49
30th September, 1951	Nil	Nil	— 4.41%	—19.13%
31st December, 1951	Nil	Nil	+ 2 7%	+30.00%
31st March, 1952	Nil	Nil	— 6.41%	— 9.61%
30th April, 1952	—20.34%	— 4.15%	Nil	Nil
31st May, 1952	+ 1.41	+ 1.32		

(b) The percentage of increase in prices of cloth in May 1952 over the prices in 1943 are as under :—

+13.5	+15	+24 61	+52.50

** The maximum ex-factory prices were reduced by 4%.
* Figures of increase over the period from 1-11-1950 to 31-12-1950.
*** Figures for increase over price period from 31st January 1946.

THE COTTON CONTROL ORDER, 1948

(As amended upto 1st April 1952)

GOVERNMENT OF INDIA

MINISTRY OF COMMERCE AND INDUSTRY

New Delhi, the 2nd August 1948.

No. 80-Tex. 1/48.—In exercise of the powers conferred by section 3 of the Essential Supplies (Temporary Powers) Act, 1946 (XXIV of 1946), the Central Government is pleased to make the following Order, namely :—

1. (i) This Order may be called the Cotton Textiles (Control) Order, 1946.

   (ii) It extends to the whole of India except the State of Jammu and Kashmir.

   (iii) It shall come into force at once.

2. The Cotton Textile (Control) Order, 1948 (Notification No. 80-Tex. 1/48, dated the 19th February 1948) and any order corresponding to that Order in force in a Part B State are hereby repealed :

Provided that any Order made, notification issued, right accrued, penalty incurred or anything done or deemed to have been done under the Orders so repealed shall be deemed to have been made, issued, accrued, incurred or done under the corresponding provisions of the Order.

2A. All Orders, notifications and directions issued or deemed to have been issued under this Order which, immediately before 21st October 1950 were in force only in certain parts of India, are hereby extended to and shall be in force in the whole of India except the State of Jammu and Kashmir.

3. In this Order, unless there is anything repugnant in the subject or context—

(*a*) "Cloth" and "Yarn" mean respectively any type of cloth or yarn manufactured either wholly from cotton or partly from cotton and partly from any other material, but "cloth" does not include—

(i) ready-made clothing other than dhoties and sarees ;

(ii) hosiery including hosiery knitted tubular fabric which has only a running thread knitted through the entire fabric ;

(iii) leather cloth, inferior or imitation leather cloth ordinarily used in book-binding and book-binding cloth ;

(iv) tracing paper ;

(v) cloth manufactured partly from cotton and partly from wool and containing 40 per cent or more of wool by weight;

(vi) rubberised or synthetic water-proof fabrics whether single textured or double-textured;

(*b*) "Controller" means the principal officer appointed by a Provincial Government for the administration of the Textile Control and includes any other officer appointed by such Government to perform the functions of the Controller under this Order or under the rules, orders and notifications issued thereunder;

(*c*) "dealer" means a person carrying on the business of selling cloth or yarn or both, whether wholesale or retail and whether or not in conjunction with any other business and shall include master weavers of handloom cloth;

(*d*) "manufacturer" includes a producer or processor, and the expression 'manufactured' and its grammatical variants shall be construed accordingly;

(*e*) the expression 'offer to sell' shall be deemed to include a reference to an intimation by a person of the price proposed by him for the sale of an article, made by the publication of a price list by exposing the article for sale in association with or bearing a mark indicating price by the furnishing of a quotation or otherwise howsoever;

(*f*) an article shall be deemed to be in the possession of a person when it is held on behalf of that person by another person or when held by that person on behalf of another person;

(*g*) "processor" means a person engaged exclusively in any process ancillary to the production of cloth or yarn such as dyeing, bleaching, embroidering, printing and finishing; and the expression 'process' and its grammatical variants shall be construed accordingly;

(*h*) "producer" means a person engaged in the production of cloth or yarn or both by power as defined in section 2 (f) of the Factories Act, 1934, and the expression 'produce' and its grammatical variants shall be construed accordingly;

(*i*) *** *** ***

(*j*) *** *** ***

(*k*) "Textile Commissioner" means the Textile Commissioner appointed by the Central Government and includes such Additional or Joint Textile Commissioners as may be appointed by the Central Government.

Clauses 4 to 11 omitted.

12. (1) Every producer who has a spinning plant shall sell, in each quarter, at least one-eighth of the total quantity of yarn sold by him in the years 1949 and 1950 taken together.

(2) Notwithstanding anything contained in sub-clause (1), the Textile Commissioner may, having regard to—

(*a*) the availability of cotton in any particular year;

(*b*) the capacity of the producer; and

(*c*) any other factor, including a strike or lock-out affecting the production of yarn,

by a special order fix a quantity of yarn lesser than that specified in sub-clause (1) which shall be sold by any producer in any quarter.

(3) No person shall acquire or instal any loom to be worked by power as defined in clause (g) of section 2 of the Factories Act, 1948 (LXIII of 1948), except with the permission in writing of the Textile Commissioner.

(3A) In granting or refusing permission under sub-clause (3) the Textile Commissioner shall have regard to the following matters, namely:—

(*a*) the number of looms already installed or working in the local area;

(*b*) whether the looms proposed to be acquired or installed are to be utilised for weaving cloth;

(*c*) the availability of yarn;

(*d*) the demand for cloth; and

(*e*) the necessity for training persons or rehabilitating displaced persons in the weaving industry.

(4) Any person having in his possession any loom which he is not entitled to work or cause or permit to be worked in accordance with this clause shall forthwith report the fact to the Controller and shall take such action as to its sealing or storage as the Controller may direct.

13. No person shall manufacture or cause to be manufactured any cloth containing any sizing or filling material or both of any descriptions exceeding in the aggregate—

(i) in the case of cloth wherein the count of warp yarn employed in 14s or coarser, 15 per cent of the weight of the cotton in the cloth;

(ii) in other cases, 10 per cent of the weight of the cotton in the cloth:

Provided that nothing in this clause shall apply where any such cloth is manufactured under the written authority of the Textile Commissioner for the purpose of—

(*a*) export outside India; or

(*b*) manufacture of any fabrics specified by the Textile Commissioner; or

(*c*) meeting any special requirements of the Central Government.

14. No person shall use wheat flour or glucose for the purpose of sizing or filling cloth.

15. No person shall sell or otherwise dispose of or purchase or otherwise acquire for the purpose of sale any cloth which has been manufactured in contravention of clause 13 or clause 14.

16. (1) For the purpose of clauses 13 to 15 the proportion of sizing or filling material or both relative to the weight of the cotton in any finished cloth shall be determined by such test carried out by such person and in such manner as the Textile Commissioner may, by notification, prescribe.

(2) A certificate signed by an officer authorised to carry out tests in pursuance of sub-clause (1) stating the result of the test shall be conclusive proof that the test has been duly carried out in the manner prescribed and that the result thereof is as is stated in the certificate.

17. *** *** ***

18. *** *** ***

19. No producer shall produce any cloth with a border whether plain, dobby or jacquard containing folded-yarn in excess of what is required for a 2″ border:

Provided that nothing in this clause shall apply where any such cloth is produced under the written authority of the Textile Commissioner for the purpose of export outside India or for meeting any special requirements of the Central Government.

20. (1) The Textile Commissioner may from time to time issue directions in writing to any producer or class of producers or the producers generally, regarding the classes or specifications of cloth or yarn, and the maximum or the minimum quantities thereof, which they shall or shall not produce during such periods as may be specified in the directions, and they shall comply with such directions.

(2) In the exercise of the powers conferred upon him by sub-clause (1), the Textile Commissioner shall have regard to the capacity of the producer to produce cloth and yarn of different descriptions or specifications and to the needs of the general public.

20A. (i) No producer other than a producer who has no spinning plant shall produce any article of clothing or any other article from cloth:

Provided that any such producer may—

(*a*) subject to any general order made by the Textile Commissioner in this behalf for the purpose of maintaining or increasing the supplies of cloth, produce any such article to the same extent to which he was producing them during the period of one year immediately preceding the first day of October 1951;

(*b*) produce any such articles which are required to meet the demands of the Central Government; and

(c) make uniforms for his employees from such quantity of cloth as the Textile Commissioner may, by order in writing, specify in this behalf.

(ii) Without prejudice to the provisions of sub-clause (1) of clause 12, no producer having a spinning plant shall utilise any yarn except for purpose of—

(a) weaving of cloth; or

(b) manufacturing of spindle tapes and tabular bandings for use in his undertaking; or

(c) tying of bundles:

Provided that the Textile Commissioner may, by order in writing, and having regard to—

(a) the quantity of yarn which any such producer is required to sell under the provisions of sub-clauses (1) and (2) of clause 12; and

(b) the quantity of hosiery produced by him in any of the two years 1949 and 1950,

authorise the producer to utilise a specified quantity or yarn for the manufacture of hosiery.

20B. (i) No producer shall employ any spindle in his undertaking except for the spinning of yarn:

Provided that the Textile Commissioner may, by general order, permit producers to utilise specified percentage of their spindles for the purposes of spinning staple fibre.

(ii) No producer having a spinning plant shall employ any loom in his undertaking except for the weaving of cloth.

(iii) No producer shall produce any yarn from a mixture of Indian cotton with foreign cotton:

Provided that the Textile Commissioner may, by general order, permit producers to manufacture yarn from a mixture of such Indian and foreign cottons as may be specified in the Order.

Explanation.—' Indian ' and ' Foreign cotton ' respectively shall have the meanings assigned to them under the Cotton Control Order, 1949; but ' Foreign cotton ' for the purposes of sub-clause (iii) does not include cotton grown in Pakistan.

20C. No producer having a spinning plant shall undertake or carry out—

(a) any processing of any cloth or yarn not produced by him; and

(b) the spinning of yarn out of cotton or cotton waste not owned by him:

Provided that nothing in this clause shall apply to any such producer who processes any cloth or yarn under the authority of the Tex-

tile Commissioner which is intended for export outside India or is intended to meet the special requirements of the Central Government:

Provided further that where the Textile Commissioner is satisfied that any description of cloth or yarn produced by a producer is not readily saleable unless it is processed and the producer does not possess the necessary processing equipment, the Textile Commissioner may, by order in writing, permit any other producer to carry out such processing in respect of such quantities of cloth or yarn as may be specified in the order.

21. (1) No manufacturer of cloth shall pack cloth except in bales containing not less than 1,450 yards and not more than 1,550 yards:

Provided that the Textile Commissioner may, by general order, permit packing of specified quantities of cloth in bales containing one-half or one-fourth of the quantity of cloth permissible under this sub-clause:

Provided further that this sub-clause shall not apply to—

(a) cloth delivered to Central Government in pursuance of any contract;

(b) cloth sold for export, and

(c) cloth of any description specified in this behalf by the Textile Commissioner which is not required by him for the purpose of issuing any directions under sub-clause (2) of clause 30.

(2) No manufacturer of yarn shall pack yarn except in bales or packages *containing not less than* 380 *lbs. and not more than* 420 *lbs.*:

Provided that the Textile Commissioner may, by general order, permit packing of specified quantities of yarn in bales or packages containing one-half or one-fourth of the quantity of yarn permissible under this sub-clause.

(3) (a) No producer having a spinning plant shall pack during any month a quantity of cloth less than—

(i) 80 per cent of the total quantity of cloth produced by him during the preceding month, or

(ii) One-sixteenth of the total quantity of cloth packed by him during the year 1948, whichever is lower;

(b) No producer of yarn who has no weaving plant shall pack during any month a quantity of yarn less than—

(i) 80 per cent of the total quantity of yarn produced by him during the preceding month, or

(ii) 1|16th of the total quantity of yarn packed by him during the year 1948, whichever is lower;

(c) No producer having both a spinning and a weaving plant shall pack during any month a quantity of yarn less than 80 per cent of the average quantity of yarn packed by him per month during the two years 1949 and 1950 taken together.

(*d*) No producer having a spinning plant shall pack—

(i) during March 1951, a quantity of cloth intended for sale in India less than 60 per cent of the total quantity of cloth packed by him in the same month;

(ii) during each of the months of April, May, June and July 1951, a quantity of cloth intended for sale in India less than 90 per cent of the total quantity of cloth packed by him in that month;

(iii) during March, April, May, June, July and August 1951, a quantity of yarn intended for sale in India less than 87½ per cent of the total quantity of yarn packed by him in the same month;

(iv) during each of the months of August, September and October 1951, a quantity of cloth intended for sale in India less than 75 per cent of the total quantity of cloth packed by him in that month, provided however that out of the balance not more than 10 per cent of the total quantity of cloth packed by him in that month may be of 'coarse' and 'medium' category.

(v) During September 1951 and every subsequent month a quantity of yarn intended for sale in India less than 87½ per cent of the total quantity of yarn packed by him in the same month; provided, however, that out of the balance the quantity of yarn packed of any particular count shall not be more than 20 per cent of the total quantity of yarn of the same count packed by him in that month.

Explanation.—For the purposes of this sub-clause—

(i) 'cloth produced' in any month means the total quantity of cloth actually woven, that is, cloth as obtained from the looms during that month;

(ii) 'yarn produced' in any month means the total quantity of yarn actually spun, that is, as obtained at the spindle point during that month;

(iii) 'quantity' in relation to cloth means quantity as measured by the linear yard and in relation to yarn means quantity in terms of weight;

(iv) cloth or yarn 'intended for sale in India' includes cloth or yarn which is produced or packed for sale directly to Government but does not include cloth or yarn packed for export.

(4) The Textile Commissioner, subject to sub-clauses (1) and (2) by a general or special order, prescribe the manner in which any manufacturer shall pack cloth or yarn in bales or packages.

(5) No producer shall pack any cloth or yarn for export unless the same is covered by a contract of sale against a valid export licence.

22. (1) The Textile Commissioner may specify—

(a) the maximum prices ex-factory, wholesale and retail at which any class or specification of cloth or yarn may be sold;

(b) the markings to be made by a manufacturer or dealer on any class or specification of cloth or yarn manufactured or sold by him and the time and manner of making such markings.

(2) Notwithstanding anything contained in sub-clause (1) above the State Government or any officer authorised by the State Government in this behalf may fix—

(a) the ex-factory maximum price for the purpose of the special markings under clause 26 in respect of any type of cloth or yarn for which such price has not been specified by the Textile Commissioner under the said sub-clause;

(b) the maximum prices ex-factory, wholesale and retail at which any cloth produced by a manufacturer or other person referred to in the explanation to sub-clause (2) of clause 23 may be sold and may further specify the markings to be made on such cloth and the time and manner of making them;

(3) A court shall presume unless the contrary is proved that the markings made on any cloth or yarn in the manner specified under this clause are made in accordance with this Order and that the prices so marked are the maximum prices specified under this clause.

23. (1) Where the marking to be made and the time and manner of making it in respect of any class or specification of cloth or yarn have been specified under clause 22—

(a) the manufacturer of, or, as the case may be the dealer in such cloth or yarn shall cause the marking to be made thereon at the time and in the manner specified;

(b) no person other than such manufacturer or dealer shall cause the marking to be made on any such cloth or yarn;

(c) no person other than the manufacturer shall have in his possession or under his control any cloth or yarn which is not so marked, unless it be for *bona fide* personal requirements;

(d) no person shall alter or deface or cause or permit to be altered or defaced any marking made on any such cloth or yarn held by him otherwise than for his *bona fide* personal requirements;

(e) no person shall make on any cloth or yarn any marking resembling the prescribed marking;

(f) no person shall have in his possession or under his control otherwise than for his *bona fide* personal requirements any cloth or yarn the marking whereon is altered or defaced or is of a character specified in paragraph (e).

2) No manufacturer shall sell or deliver—

(i) any cloth or yarn of which the maximum ex-factory price has not been specified by the Textile Commissioner under clause 22; and

(ii) any cloth unless he has previously sent to the Textile Commissioner a sample of such cloth of the dimensions of 6 in. x 6 in. together with true and accurate information, in the Forms prescribed for this purpose by the Textile Commissioner, about the manufacturing particulars thereof and the manner in which its price has been calculated.

Explanation.—Nothing in this sub-clause applies to a manufacturer who does not manufacture any yarn or to a processor or to a person engaged in the production of handloom cloth.

(3) No person shall in the manufacture of cloth use yarn (other than handspun yarn) the maximum ex-factory price of which has not been specified by the Textile Commissioner under clause 22.

24. (1) No manufacturer or dealer shall sell or offer to sell any cloth or yarn at a price higher than the maximum price specified in this behalf under clause 22.

(2) Every sale of cloth or yarn by a dealer except to a consumer shall be at a price either F.O.R. station of despatch or ex-godown of storage at the buyer's option. Provided that the commission of a commission agent shall be paid by the buyer.

(3) No person acting as a commission agent in respect of a sale of cloth or yarn to which sub-clause (2) applies shall receive a commission which exceeds ½ per cent of the maximum price of the cloth or yarn the subject-matter of such sale.

(4) The Textile Commissioner may by notification in the official Gazette provide for the giving of a cash memorandum by any manufacturer or dealer in respect of any sale transaction and for the particulars to be contained in any such cash memorandum.

(5) No manufacturer or dealer shall, without sufficient cause, refuse to sell cloth or yarn to any person.

Explanation.—The possibility or expectation of obtaining a higher price at later date shall not be deemed to be a sufficient cause for the purpose of this clause.

25. (1) Notwithstanding anything contained in sub-clause (2) no manufacturer or dealer shall after the 30th November 1948, buy or sell or have in his possession any cloth or yarn manufactured in India and packed before the 1st August 1948.

(2) No manufacturer or dealer shall buy or sell or have in his possession any cloth or yarn after the expiration of twelve months from the last day of the month marked on the cloth or yarn in accordance

with a direction given under clause 22 and no person shall buy or sell or have in his possession any such cloth or yarn in unopened bales or cases after the expiration from the said date of a period of three months in the case of a manufacturer and a period of six months in any other case.

(3) For the purposes of this clause—

(i) a bale or case shall be deemed to be unopened if the hoops or other bindings and all outer coverings have not been removed;

(ii) cloth or yarn of Indian manufacture not bearing any markings in accordance with the directions under clause 22 shall, unless the contrary is proved, be deemed to have been manufactured and packed before the 1st August 1948.

(4) Nothing in this clause shall apply to handloom cloth.

26. Notwithstanding anything contained in sub-clauses (1) and (2) of clause 25, any cloth or yarn not disposed of within the period specified may be kept and sold by a dealer subject to the conditions notified in this behalf by the Textile Commissioner prescribing the special markings to be made on such cloth or yarn, the agency by which the marking shall be made and the fee payable for such marking:

Provided that no such cloth or yarn shall be kept undisposed of by any dealer, or any person holding on behalf of a dealer for more than six months after the date of such marking.

27. Where in pursuance of clause 22(1)(b) or clause 26, any piece of cloth is required to be marked at one end with the ex-factory price or with the price at which it is to be sold retail, and the piece is not sold as a whole, that portion of the piece containing the price marking shall be sold last by the dealer.

28. (1) No producer shall, at any time, have in his possession—

(a) a quantity of unpacked cloth exceeding the total quantity of cloth produced by him during the preceding two months;

(b) a quantity of yarn exceeding—

(i) in the case of a person engaged in the production of yarn alone, the quantity of yarn produced by him during the preceding month;

(ii) in the case of a person engaged in the production of cloth alone, the quantity of yarn reasonably required by him for producing cloth during the next two months; and

(iii) in the case of persons engaged in the production of cloth and yarn the sum total of the quantity of yarn reasonably required by him for the production of cloth during the next two months and the quantity equal to the yarn produced by him during the preceding month over and above his own requirements during that period.

Explanation.—For the purposes of this sub-clause cloth on looms and yarn in the course of manufacture into cloth shall be excluded in computing the stocks in possession of a producer.

(2) No person engaged in manufacturing from cloth or yarn articles of clothing or other articles such as ropes, tapes, newar, bandages or canvas shall at any time have in his possession stocks of cloth or yarn in excess of the quantity of cloth or yarn used by him during the preceding two months in such manufacture.

(3) No dealer or processor shall at any time have in his possession stocks of cloth exceeding the total quantity of cloth sold by him during the preceding six months or exceeding such quantity as is fixed in this respect by a special order by the Textile Commissioner or by the Provincial Government or any Officer authorised by the Provincial Government in this behalf:

Provided that a dealer or processor may also hold any quantity which has been made available to him by or under the orders of the Textile Commissioner or by the Provincial Government or any of its Officers.

(4) No person shall at any time for his own needs and the needs of his family have in his possession a quantity of cloth exceeding the quantity calculated at the rate of 60 yards for every person above the age of 6 and 30 yards for every person who has not completed that age.

(4A) No person, other than a producer, dealer or a person referred to in sub-clause (2), shall at any time have in his possession a quantity of yarn exceeding 10 lbs.

(5) For the purposes of sub-clause (1) any yarn agreed to be sold to a dealer by a producer and of which delivery has not been taken by the due date, shall be deemed to be in the possession of the dealer and not the producer.

29. (1) Any person having in his possession cloth or yarn in excess of the quantity permitted under clause 28 shall forthwith report the fact, in the case of a manufacturer to the Textile Commissioner and in other cases to the Controller.

(2) Any manufacturer or dealer in possession of cloth or yarn in respect of which the period for disposal prescribed under clause 25 or under the proviso to clause 26 is about to expire may report the fact to the Textile Commissioner, or the Controller respectively.

(3) Any person making a report under sub-clause (1) or sub-clause (2) shall take such action as to the storage, distribution or disposal of the cloth or yarn as the Textile Commissioner or the Controller may direct.

ADDITIONAL POWERS TO THE TEXTILE COMMISSIONER

30. (1) No manufacturer shall sell or deliver any cloth or yarn manufactured by him, except to the following categories of persons, namely—

(*a*) persons nominated by the Central Government to acquire cloth or yarn to meet the requirements of the Central Government;

(*b*) persons holding licences for export of cloth or yarn out of India;

(*c*) wholesale dealers nominated by a State Government; and

(*d*) owners of undertakings in which cloth or yarn is required for manufacture of any goods.

(2) The Textile Commissioner may, with a view to securing a proper distribution of cloth or yarn, issue directions to any manufacturer to sell specified quantities of cloth or yarn to specified persons falling in any of the categories referred to in sub-clause (1) and where any such directions are issued the manufacturer shall comply with them.

(3) In the exercise of the powers conferred by sub-clause (2), the Textile Commissioner shall have regard to the following matters, namely,—

(*a*) the requirements of various categories of persons specified in sub-clause (2);

(*b*) the availability of cloth or yarn of different descriptions; and

(*c*) the requirement of any local area.

(4) Notwithstanding anything contained in this clause, the Textile Commissioner may, by general order, direct that the provisions of this clause shall not apply to such percentage of cloth or yarn produced by manufacturers as he may specify in the Order.

30-A. (1) A wholesale dealer shall not sell or deliver any cloth or yarn except to a retail dealer or dealers specified by the Controller.

(2) In the exercise of the powers conferred by sub-clause (1), the Controller shall have regard to the following matters, namely,—

(*a*) the number of retail dealers in any local area;

(*b*) the requirements of any specified local area;

(*c*) the availability of cloth or yarn for distribution among retail dealers in any local area; and

(*d*) the extent of business carried on by a retail dealer.

30-B. (1) A retail dealer shall not sell cloth or yarn, except to a consumer, and except under and in accordance with directions issued from time to time by the Controller.

(2) In the exercise of the powers conferred by sub-clause (1), the Controller shall have regard to the following matters, namely—

(*a*) the number of consumers in any local area;

(b) the requirements of any specified local area; and

(c) the availability of cloth or yarn for distribution among the consumers in any local area.

31. The Textile Commissioner may, with a view to securing compliance with this order—

(*a*) require any person to give such information in his possession with respect to any business carried on by that or any other person;

(*b*) inspect or cause to be inspected any books or other documents belonging to or under the control of any person;

(*c*) enter and search, or authorise any person to enter and search, any premises and seize or authorise any person to seize any article in respect of which he has reason to believe that a contravention of this order has been committed and any other article in the premises which he has reason to believe has been or is intended to be used in connection with such contravention.

32. *** *** ***

33. *** *** ***

34. The Textile Commissioner may by a general or special order in writing and with the previous sanction of the Central Government authorise any officer to exercise on his behalf all or any of his functions and powers under this order.

PROCEDURE AND PENALTY

35. No person shall, with intent to evade the provisions of this order, refuse to give any information lawfully demanded from him under clause 31 or conceal, destroy, mutilate, or deface any book or other document kept by him in the course of his business.

36. *** *** ***

37. Any court trying a contravention of any of the provisions of this order may direct that any article or articles in respect of which it is satisfied that the order has been contravened shall be forfeited ***.

MAXIMUM AND MINIMUM PRICES OF COTTON, 1951-52 and 1952-53

EXTRACTS FROM LATEST NOTIFICATIONS

Bombay, the 20th October 1951

S.R.O. 1618.—In exercise of the powers conferred on me by sub-clause (1) of clause 3 of the Cotton Control Order, 1950, I hereby fix the maximum and the minimum prices at which Indian Cotton of the 1951-52 season may be sold or purchased as under:—

1. These prices shall take effect as soon as contracts relating to Indian Cotton of the 1951-52 season are permitted by me under clause 6 of the said order.

2. *** *** ***

3. (1) The prices specified in the schedule are in Rupees per candy of 784 lbs. nett for delivery in full-pressed bales ex-seller's godown Bombay, and include ¼ per cent brokerage payable by the seller to the buyer and the usual sample and stone allowance.

(2) The minimum and maximum prices for delivery at any place other than Bombay shall be the prices specified in the schedule less a sum equivalent to the railway freight from the place of origin to Bombay and Rs. 10 per candy plus the sum, if any, equivalent to the railway freight from the place of origin to the place of delivery to the buyer and Rs. 10 per candy.

(3) The maximum prices specified in paragraph 2 and sub-paragraphs (1) and (2) of paragraph 3 shall be increased, where the sale is directly to a manufacturer, by 1¼ per cent thereof, and where the sale is directly to an 'A' Class licensee, by ¾ per cent thereof.

(4) The maximum and minimum prices specified in paragraph 2 and sub-paragraphs (1) and (2) of paragraph 3 shall be decreased by Rs. 25 per candy when the subject-matter of the contract is ginned (that is, unpressed) cotton.

(5) Where cotton which is the subject matter of a contract is loose cotton obtained by opening a full-pressed bale and does not exceed 30 lbs. in weight, the maximum prices specified in paragraph 2 and sub-paragraphs (1) and (2) of paragraph 3 shall be increased by 12½ per cent thereof.

(6) The minimum prices fixed under this notification shall not apply to any cotton which is inferior in class or staple to that for which "off" allowances are specified in columns 5 and 6 of the schedule.

A certificate from the Textile Commissioner to the effect that the contract entered into is for the purposes of export, shall be conclusive evidence of that fact.

SCHEDULE OF PRICES IN 1951-52 and 1952-53 *

Description of cotton season 1951-52	Basic staple length inches	Basic minimum price Rs. per candy	Basic maximum price Rs. per candy	"Off" and "On" Allowance for Class other than Basic Class					"Off" Allowances for staple below basic staple		"On" Allowances for staple above the basic staple			
				Good	Fully Good	Fine	Super-fine	Extra Super-fine	2/32"	1/32"	1/32"	2/32"	3/32"	4/32"
							Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.
Jarilla ...	25/32"	495	820	...	5	Basic	5	15	40	20	20	45	...	...
Vijay ...	25/32"	565	925	...	5	,,	5	10	45	20	20	45	70	100
Surat ...	7/8"	655	1,020	...	5	,,	5	10	50	25	20	45	70	100
P/Am 4F R.G. ...	3/4"	525	850	...	5	,,	5	10	40	20	20	45	...	...
P/Am 4F S.G. ...	3/4"	545	870	...	5	,,	5	10	40	20	20	45	...	...
P/Am L.S.S.R.G. ...	13/16"	585	920	...	5	,,	5	10	45	20	20	45	70	...
P/Am L.S.S. S.G. ...	13/16"	605	940	...	5	,,	5	10	45	20	20	45	70	...
P/Am 289F R.G. ...	7/8"	675	1,000	...	5	,,	5	10	50	25	20	45	70	100
P/Am 289F S.G. ...	7/8"	705	1,030	...	5	,,	5	10	50	25	20	45	70	100
Compta ...	7/8"	645	990	...	5	,,	5	10	50	25	20	45	...	...
Western ...	13/16"	555	890	...	5	,,	5	10	45	20	20	45	...	...
Upland ...	13/16"	575	885	...	5	,,	5	10	45	20	20	45	...	...
Cambodia ...	7/8"	675	1,045	...	5	,,	5	15	60	30	40	65	90	120
Karunganni ...	13/16"	575	935	...	5	,,	5	10	50	25	20	45	70	100
Dhollera ...	3/4"	...	780	...	5	,,	5	10	40	20	20	45	...	...
Kalagin ...	3/4"	...	780	...	5	,,	5	10	40	20	20	45	...	...
Bengal Deshi ...	...	...	645	40	Basic	20	40	60	...	...	...	...	...	...
Oomra Deshi ...	...	...	680	...	5	Basic	0	40	...	...	...	...	...	...
Mathia and Mungari ...	...	...	680	...	5	,,	20	40	...	...	...	...	...	...
C P I. & II ...	5/8"	...	720	...	5	,,	5	15	40	20	20	45	...	...
Central India Cotton ...	5/8"	...	695	...	5	,,	5	15	40	20	20	45	...	...
Buri American ...	7/8"	625	940	...	5	,,	5	10	50	25	20	45	...	...
Parbhani American ...	7/8"	625	940	...	5	,,	5	10	50	25	20	45	...	...
Gaorani 6 and 12 ...	7/8"	625	990	...	5	,,	5	10	50	25	20	45	...	...
Jayadhar ...	29/32"	645	1,015	...	5	,,	5	10	40	20	20	45	...	...
Kalyan ...	25/32"	510	870	...	5	,,	5	10	40	20	20	45	...	...

* On the 7th July 1952, Government announced an increase in the basic minimum price by Rs. 55 for the 1952-53 season. Thus, Jarilla which was Rs. 495 was increased to Rs. 550. No increase was made in the maximum price for 1952-53.

NOTE.—In the case of cottons specified below, if they conform to the proviso, given at the end of paragraph 4 of this notification and if they have been grown in areas reserved by the Agricultural Department of the State concerned for the purposes of procuring pure seed, the basic maximum prices specified in column 4 above shall be deemed to be increased by the amounts shown below, namely,—

(i) H.420 ..	Rs. 80 per candy over Jarilla of column 1.
(ii) Jayadhar ..	Rs. 50 per candy over Jayadhar of column 1.
(iii) Karunganni K. 2, K. 5	Rs. 50 per candy over Karunganni of column 1.
(iv) Gaorani 6, 12	Rs. 50 per candy over Gaorani 6 and 12 of column 1.

THE COTTON CONTROL ORDER, 1950

MINISTRY OF INDUSTRY AND SUPPLY

NOTIFICATIONS (Amended upto July 1952)

New Delhi, the 13th September 1950

S.R.O. 594.—In exercise of the powers conferred by section 3 of the Essential Supplies (Temporary Powers) Act, 1946 (XXIV of 1946), the Central Government is hereby pleased to make the following Order, namely:—

1. (*a*) This Order may be called the Cotton Control Order, 1950.

(*b*) It extends to the whole of India except the State of Jammu and Kashmir.

(*c*) It shall come into force at once.

(*d*) The Cotton Control Order, 1949, and any order corresponding thereto in force in a Part B State is hereby repealed:

Provided that any order made, notification issued, right accrued, penalty incurred, or anything done under the said order or any corresponding order in force in a Part B State shall be deemed to have been made, issued, accrued, incurred or done under the corresponding provisions of this order.

2. In this Order, unless the context otherwise requires,—

(*a*) "*carrier*" *includes a railway administration or any other* person engaged in the business of transporting property from one place to another by land, air, or water;

(*b*) "contract" means a contract made or to be performed in whole or in part in India relating to the sale or purchase of cotton;

(*c*) "cotton" means—

(i) ginned cotton; and

(ii) ginned and pressed *cotton*;

and includes both Indian and foreign cotton;

(*d*) "cotton ginning factory" shall have the same meaning as in the Cotton Ginning and Pressing Factories Act, 1925;

(*dd*) "cotton season" means the period from the 1st day of September of one calendar year, until and inclusive of, the thirty-first day of August in the next calendar year.

(*e*) "foreign cotton" means cotton grown in any country outside India;

(*f*) "form" means a form appended to this order;

(*g*) "forward contract" means a contract for the delivery of cotton at some future date and which is not of the nature of a ready delivery contract;

(*h*) "India" does not include the State of Jammu and Kashmir;

(*i*) "Indian cotton" means cotton grown at any place in India;

(*j*) "licensing authority" means—

(*a*) in relation to A class or B class licence, the Textile Commissioner; and

(*b*) in relation to C class licence, the State Government or any officer authorised by the State Government in this behalf for any specified area.

(*k*) "manufacturer" means a manufacturer of yarn;

(*l*) "option in cotton" means a contract, by whatever name called, for the purchase or sale of a right to buy or sell or a right to buy and sell cotton in future, and includes a *teji*, a *mandi* or a *teji-mandi* in cotton;

(*m*) an article shall be deemed to be in the possession of a person when it is held on behalf of that person by another person or when held by that person on behalf of another person;

(*n*) the expressions "yarn" and "Textile Commissioner" shall have the same meaning as they have in the Cotton Textiles (Control) Order, 1948.

3. (1) The Textile Commissioner may fix the maximum and the minimum prices at which any cotton or kapas or cotton seed may be sold or purchased.

(2) Where the maximum and minimum prices have been fixed as aforesaid in respect of any cotton or kapas or cotton seed, no person shall sell or offer to sell or purchase or offer to purchase any such cotton or kapas or cotton seed at a price exceeding the maximum or lower than the minimum price so fixed.

4. Except in the cases excluded from the operation of this clause under clause 6, no person shall enter into:—

(*a*) any contract; or

(*b*) any option in cotton.

5. All contracts and options in cotton entered into or made after the commencement of this Order in contravention of clause 4 shall be void.

6. The Textile Commissioner may by general order and subject to such restrictions and conditions as he may prescribe exclude from the operation of clause 4 any class or description of contracts.

7. (1) The Textile Commissioner may specify the maximum quantity of any description of cotton which a manufacturer may buy during a specified period or within a specified area or which at any time he may have in his possession.

(1A) The Textile Commissioner in the exercise of the powers conferred upon him under sub-clause (1) shall have regard to the following matters, namely :—

(*a*) in the case of a manufacturer doing business of manufacturing yarn before the 1st September 1947, the consumption by the manufacturer of different descriptions of cotton grown in India and in Pakistan, for the purpose of manufacturing yarn during the Cotton Season 1947-48, or where the manufacture of yarn was for any reason interrupted in that season, during such other cotton season, as the Textile Commissioner may, in the circumstances of the case, deem equitable,

(*b*) the capacity of the manufacturer to manufacture yarn during the previous cotton season,

(*c*) the defaults, if any, made by the manufacturer in buying cotton allotted to him during the previous cotton season.

(2) No manufacturer shall buy or have in his possession a quantity of any cotton exceeding the maximum quantity specified as aforesaid.

8. Without prejudice to any order made under sub-clause (1) of clause 7, where, at any time, in the opinion of the Textile Commissioner, any manufacturer has in his possession a quantity of cotton in excess of the quantity which would reasonably be required by him for manufacturing yarn in the next six months, it shall be open to the Textile Commissioner, to the extent of such excess, to direct such manufacturer to sell such quantity of the excess cotton at such price and on such conditions as may be specified; and every manufacturer shall comply with such direction.

9. No person shall purchase, sell, store or carry on business in cotton or shall hold cotton in hypothecation or against a pledge except under and in accordance with the conditions of a licence in Form "A".

Exception.—Nothing in this clause shall apply—

(*a*) to a manufacturer;

(*b*) to a person who purchases or stores cotton for his own use and not for the purpose of sale and who does not at any time have

in his possession a quantity of cotton exceeding 24 bales of ginned and pressed cotton or boras of ginned cotton.

9A. (1) There shall be the following three classes of licences granted under this Order, namely :—

(1) A class licence.

(2) B class licence.

(3) C class licence.

(2) Every such licence shall be in the appropriate form.

9B. (1) Subject to the provisions of sub-clause (2), every person who :—

(*a*) (i) has sold a minimum quantity of 3,000 bales of Indian cotton directly to any manufacturer during any of the cotton seasons 1948-49, 1949-50 and 1950-51 ; and

(ii) carried on business in cotton in more than one area specified by the Textile Commissioner in this behalf

shall be entitled to an A class licence.

(*b*) has sold a minimum quantity of 1,500 bales of Indian cotton grown in any of the areas specified under sub-clause (a) (ii) to any manufacturer directly during any of the cotton seasons specified in sub-clause (a) (i)

shall be entitled to a B class licence.

(*c*) (i) carried on business in cotton in any of the areas specified by the Textile Commissioner in this behalf during any of the cotton seasons 1948-49, 1949-50 and 1950-51, and

(ii) held a valid licence under clause 9 on or after the 1st day of September 1950

shall be entitled to a C class licence :

Provided that no person shall be entitled to an A class and a C class licence at the same time.

(2) Notwithstanding anything contained in sub-clause (1), a licensing authority may refuse to grant a licence to any person if, for reasons to be recorded in writing, it is of opinion that such person is unfit to hold a licence.

10. Any person desiring a licence shall make an application to the appropriate Licensing Authority of his State in Form "B"

11. (1) Every licence granted under this Order shall be valid for the area and for the period specified in the licence but may be renewed from time to time for a period of one year.

(2) There shall be charged for the grant or renewal of a licence of the type specified in column 1 of the undermentioned table, the fee specified in column 2 thereof :—

TABLE

1	2
Type of Licence	*Amount of fee*
A class licence	Rs. 100
B class licence	Rs. 50
C class licence	Rs. 25

Provided that in respect of any one year no person shall be liable to pay more than Rs. 25 for the grant or renewal of any number of C class licences within the same State and the amount, if any, paid by him in excess of Rs. 25 shall, on application made in that behalf, be refunded to him by the State Government.

12. If a licence granted under this Order is lost or destroyed the Licensing Authority may after making such enquiry as it may deem fit, issue a duplicate licence on payment of a fee of Rs. 5.

13. (1) No person being the holder of a licence issued under this Order shall contravene any of the conditions mentioned in the licence and if any such person contravenes any of the said conditions, then without prejudice to any other remedy his licence may be cancelled by the Licensing Authority.

(2) Notwithstanding anything contained in sub-clause (1) the Licensing Authority may without previous notice or without assigning any reasons suspend or cancel a licence issued under this Order and such cancellation or suspension shall not entitle the licensee to any compensation or the refund of any fees paid in respect of any such licence.

14. (1) *** *** ***

(2) The Textile Commissioner may direct any person to furnish samples of any cotton in his possession ; and may issue such instructions as he thinks fit regarding such samples.

(3) Every person, to whom a direction or instruction is issued under this clause, shall comply with any such direction or instruction.

14A. (1) Where the Textile Commissioner has, in exercise of the powers conferred upon him under sub-clause (1) of clause 7 specified the maximum quantity of any description of cotton which a manufacturer may buy, the manufacturer may make an application to the Textile Commissioner for an allotment of such cotton or any portion thereof.

(2) On receiving such an application, the Textile Commissioner may make an allotment to the manufacturer of specified quantities of the required cotton to be acquired from specified licensees at specified prices and within a specified time.

(3) In the exercise of powers conferred upon him by sub-clause (2) the Textile Commissioner shall have regard to the following matters, namely :—

(*a*) the availability of the required description of cotton for distribution among manufacturers ;

(*b*) the stocks of cotton in the possession of the applicant ; and

(*c*) the maximum quantity of the required description of cotton specified under sub-clause (1) of clause 7 in respect of the applicant and other manufacturers.

(4) Where the Textile Commissioner has made any allotment under sub-clause (2), the manufacturer shall acquire from the specified licensees and the specified licensee shall, notwithstanding anything contained in the terms of his licence, sell or deliver to the manufacturer, the allotted quantities of cotton at specified price and within the specified time :

Provided that where the manufacturer fails to acquire such cotton or any part thereof from the specified licensees within the specified time, the Textile Commissioner may cancel the order of allotment in respect of any cotton not so acquired.

Explanation.—In this clause and the next succeeding clause, the expression "manufacturer" includes an A class licensee authorised in writing by a manufacturer to purchase cotton on his behalf.

14B. (1) The Textile Commissioner may, for the purpose of securing proper distribution of cotton among manufacturers and with the previous sanction of the Central Government, appoint for any specified area a distribution committee consisting of such number of persons as the Textile Commissioner may deem fit.

(2) Where a distribution committee has been appointed under sub-clause (1) for any area :—

(*a*) no manufacturer shall acquire cotton grown in that area except in pursuance of an allotment made in accordance with the provisions of clause 14A ; and

(*b*) the functions of the Textile Commissioner under clause 14A shall be exercisable by the distribution committee in the like manner and subject to the like restrictions.

15. The Textile Commissioner may appoint any person or persons to advise him for the purpose of fixing the exact value of the cotton directed to be sold under any of the provisions of this Order in regard to any case or classes of cases.

16. The Textile Commissioner may make regulations—

(*a*) prescribing the form of application for manufacturers who desire assistance from the Textile Commissioner for the purpose of obtaining supplies of cotton ;

(*b*) regarding the payment of the price and survey and other expenses including the deposit of any amount as earnest money in respect of such assistance; and

(*c*) generally, as regards the procedure to be followed in giving effect to such applications.

17. (1) The Textile Commissioner may direct any person holding stocks of kapas to get it ginned before a specified date and every such person shall comply with such direction.

(2) The Textile Commissioner may by a general order prohibit from such date or dates as may be specified in the order the possession of any kapas of a specified description or in a specified area except under and in accordance with the permission in writing of the Textile Commissioner.

(3) Notwithstanding anything contained in this clause, no manufacturer shall purchase or otherwise acquire kapas: Provided that a manufacturer who is the owner or lessee of a cotton ginning factory acquired by him by purchase, lease or in any other manner under a document registered before the 1st September 1950, may be permitted by the Textile Commissioner, subject to such conditions as he may specify, to purchase such quantity of kapas as, considering the ginning capacity of such factory, is capable of being ginned at that factory.

18. The Textile Commissioner may by general or special order prohibit the transport of cotton from any place within any area to any place outside that area by rail, road or water except under such conditions, limitations and restrictions as may be specified in such order.

19. The Textile Commissioner may by order in writing direct any carrier to close the booking and transport of any cotton by rail, road or water between such places and for such period as may be specified in the order and such carrier shall comply with the order.

20. The Textile Commissioner may with a view to securing compliance with this Order—

(*a*) require any person to give any information in his possession with respect to any business carried on by that or any other person;

(*b*) inspect or cause to be inspected any books or other documents belonging to or under the control of any person;

(*c*) enter and search or authorise any person to enter and search any premises and seize or authorise any person to seize any article in respect of which he has reason to believe a contravention of this Order has been committed and any other article in the premises which he has reason to believe has been or is intended to be used in connection with such contravention.

21. Every person who is required to give any information under clause 20 shall comply with such requisition.

22. (1) Every manufacturer shall submit to the Textile Commissioner before the 12th October 1950 and thereafter before the 12th day of every succeeding month a return in Form "D" giving all the particulars specified therein.

(2) Every manufacturer shall submit to the Textile Commissioner, for the first fortnight of October 1950 and for every fortnight thereafter, a return in Form "E" giving all the particulars specified therein. The return should reach the Textile Commissioner not later than 7 days after the completion of the fortnight.

(*Forms are not reproduced here*).

Cotton Advisory Board (1952)

[Govt. of India Resolution No. 1(73)-Tex(2)/50 dated 17-10-50]

(1) Mr. Neville N. Wadia.
(2) „ Chandulal Parikh.
(3) „ M. L. Shah.
(4) „ K. Sreenivasan.
(5) „ Kalidas Sawhney (Secy., Indian Central Cotton Committee, Bombay).
(6) Mr. P. H. Bhutta.
(7) „ J. H. Heeramanick.
(8) „ R. G. Saraiya.
(9) „ Purshottamdas Thakurdas.
(10) „ Madanmohan R. Ruia.
(11) „ Hansraj Jivandas.
(12) „ R. C. Jall.

Textile Development Committee (1952)

[Govt. of India Resolution No. 8(4)CT/50 dated 1-12-50]

Chairman: Hon'ble Minister for Commerce & Industry.

Present Members:

Industry:

(1) Mr. G. D. Birla.
(2) „ Kasturbhai L______.
(3) „ K. M. D. Thackersey.
(4) „ Shri Ram.
(5) „ J. A. Andrew.
(6) „ Neville N. Wadia.
(7) „ Chandulal Parikh.

Labour:

(8) Mr. Khandubhai Desai.
(9) „ S. R. Vasavada.
(10) „ Asoka Mehta.

Members of Planning Commission may attend.

The Committee has powers to co-opt any additional members as and when considered necessary.

Cotton Textiles and Cotton Control Committee (1952)

[Govt. of India Resolution No. 13 (2)-CT/50 dated 1-12-50]

Chairman : Shri Morarji Desai, Chief Minister, Bombay Government.

Present Members :

Industry :

(1) Mr. G. D. Birla.
(2) „ Kasturbhai Lalbhai.
(3) „ K. M. D. Thackersey.
(4) „ Shri Ram.
(5) „ J. A. Andrew.
(6) „ Neville N. Wadia.
(7) „ Chandulal Parikh.

Labour :

(8) Mr. Khandubhai Desai.
(9) „ S. R. Vasavada.
(10) „ Asoka Mehta.
(11) „ Textile Commissioner, Member-Secretary.

Working Party for the Cotton Textile Industry (1952)

[Govt. of India Notification No. 1 (4)-WP/1 dated 19-6-50]

The Committee has power to co-opt any additional member when considered necessary.

Chairman : Mr. A. Ramaswamy Mudaliar.

Members :

(1) Mr. T. Sivasankar, I.C.S.
(2) Prof. Radhakamal Mukherji.
(3) Mr. D. P. Joshi.
(4) Mr. K. M. D. Thackersey.
(5) „ Bharat Ram.
(6) „ S. R. Vasavada.
(7) „ P. H. Bhutta.

Cotton Textiles Fund Committee (1952)

(1) Mr. Shri Ram (Chairman).
(2) „ T. V. Baddeley.
(3) „ V. N. Chandavarkar.
(4) „ A. D. Gorwala.
(5) „ A. K. Kanji.
(6) „ Kasturbhai Lalbhai.
(7) „ C. S. Ratnasabhapati Mudaliar.
(8) Prof. N. G. Ranga.
(9) Mr. S. C. Roy.
(10) „ R. G. Saraiya.
(11) „ J. C. Morton.
(12) „ S. R. Vasavada.
(13) Dr. P. G. Sarkar.
(14) „ K. Venkatraman.
(15) Mr. K. R. P. Aiyangar.
(16) „ Govindan Nair, I.C.S.
(17) „ T. Swaminathan, I.C.S. (Member-Secretary).

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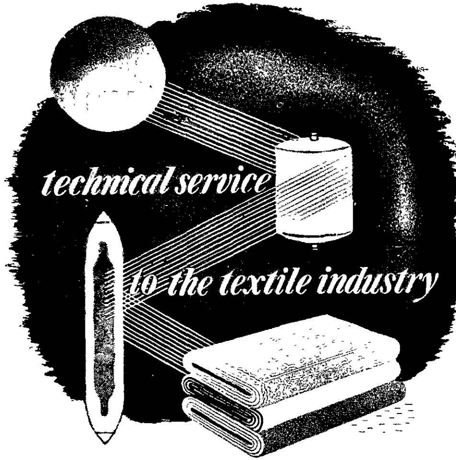

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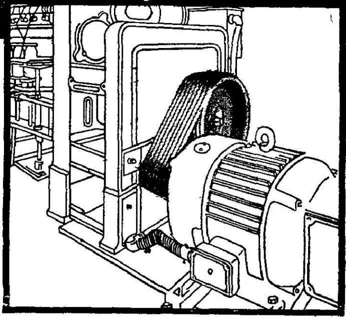

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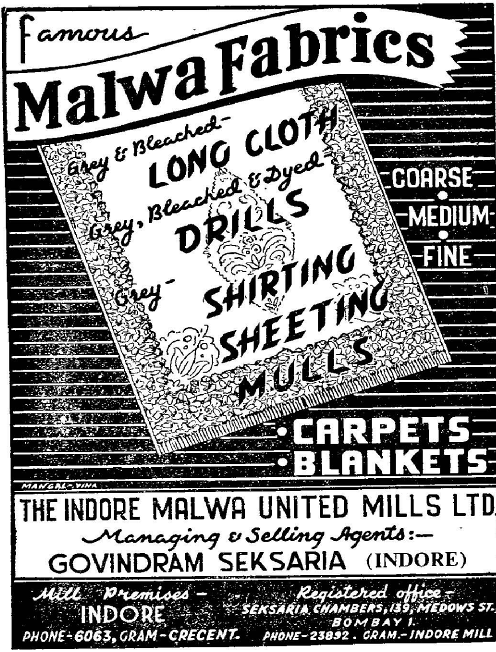
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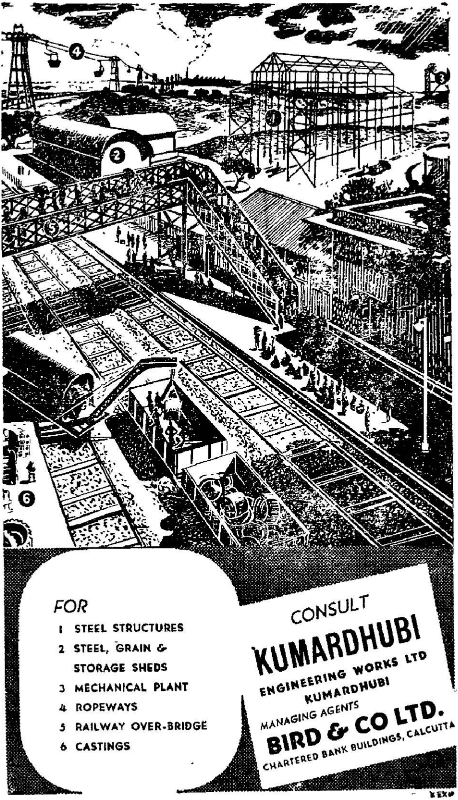
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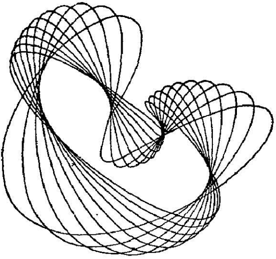

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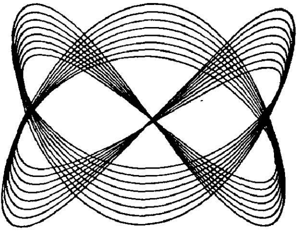

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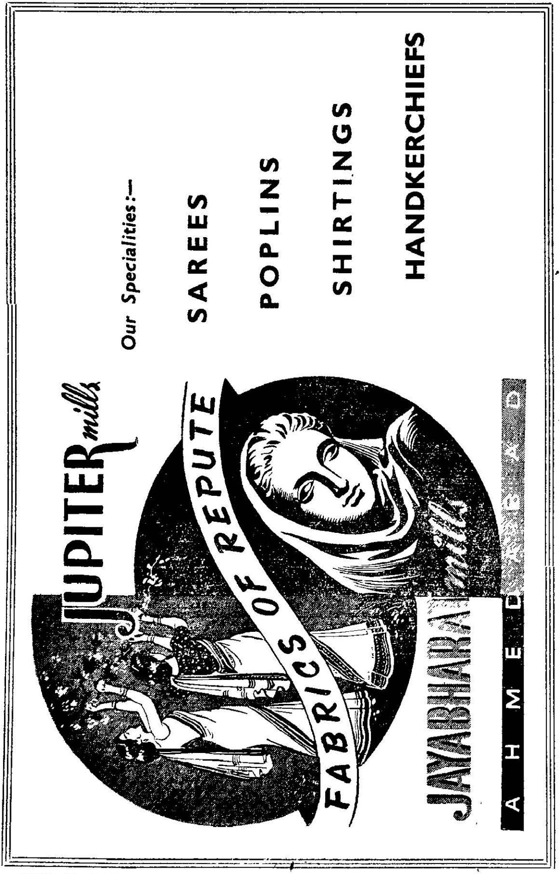
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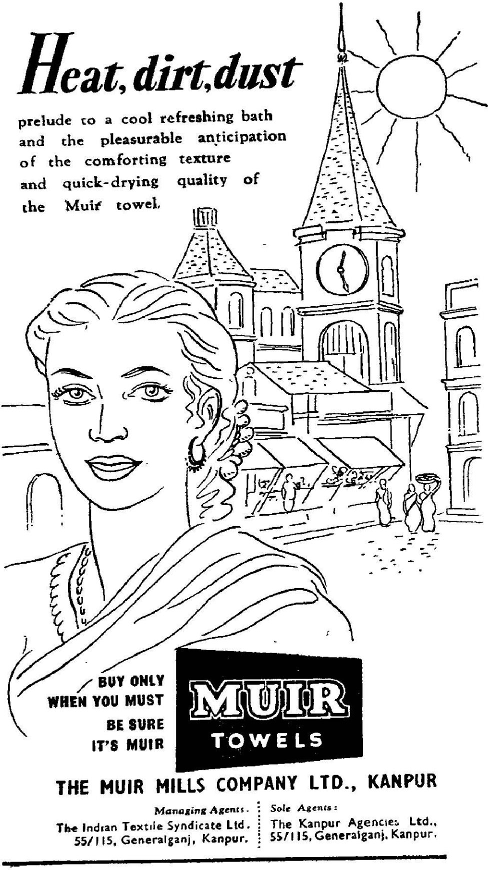
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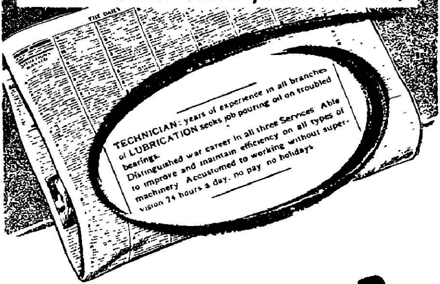

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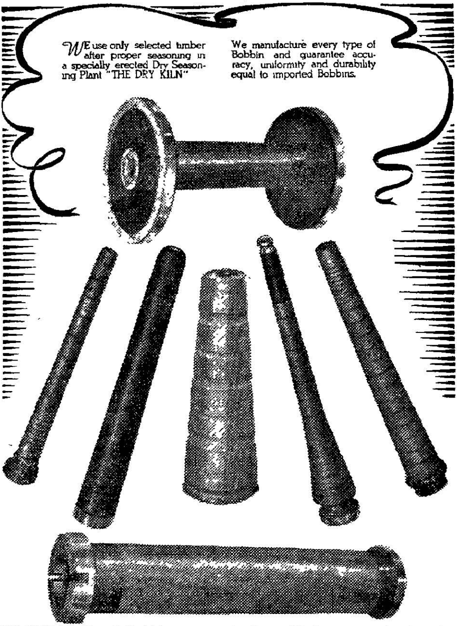

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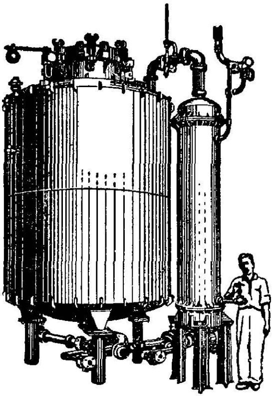

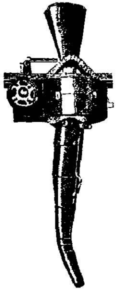

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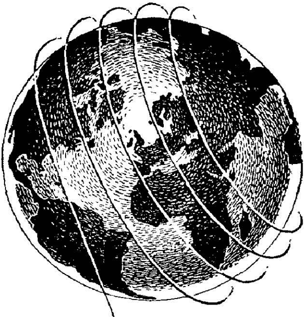

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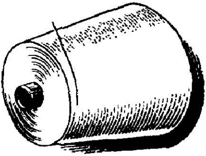

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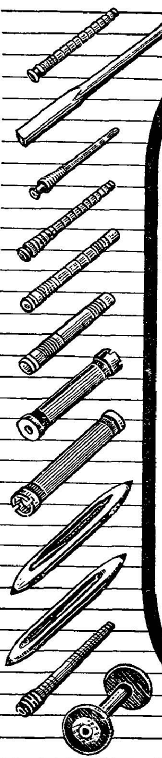

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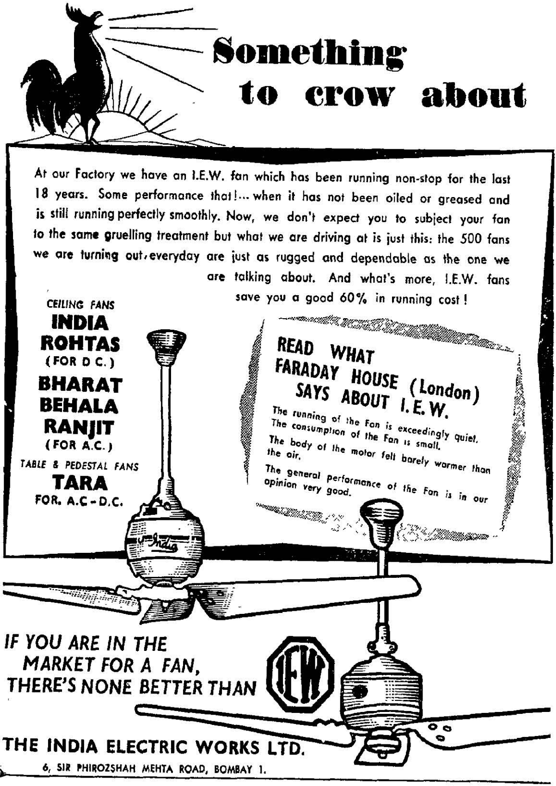
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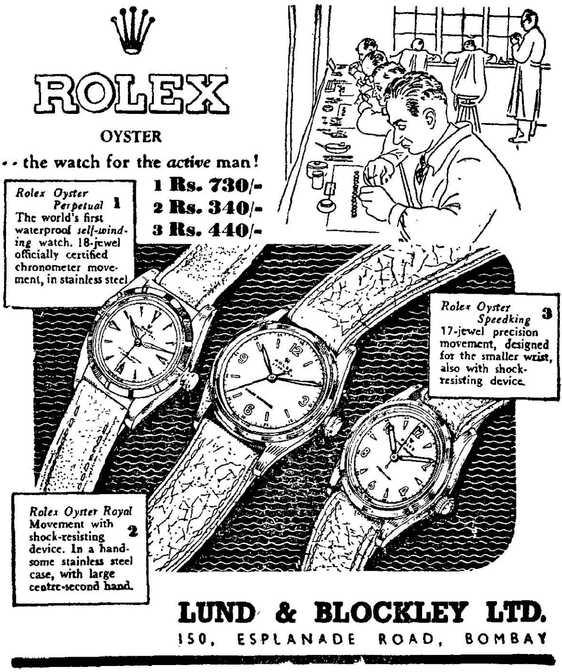
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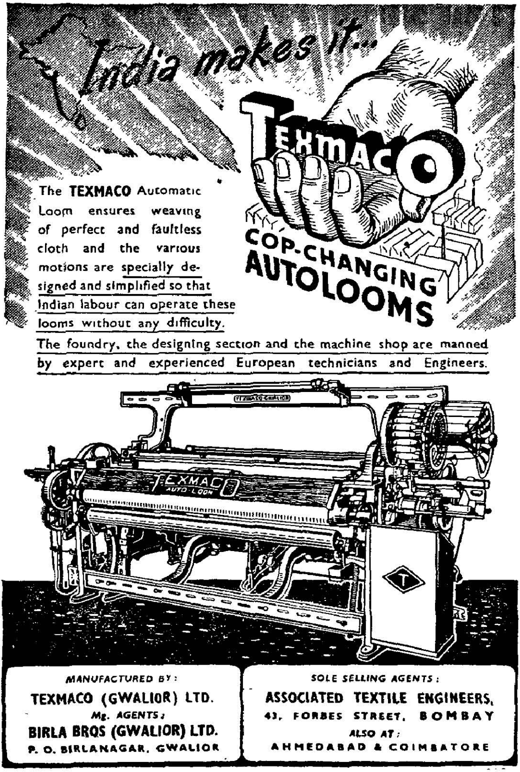
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1945	,,	4,88,681	,,	28,37,263
1946	,,	8,18,218	,,	33,86,623
1947	,,	12,07,260	,,	38,69,960
1948	,,	15,54,777	,,	45,46,706
1949	,,	21,`2,074	,,	50,75,366
1950	,,	24,65,667	,,	56,56,(43

CLAIMS PAID EXCEED Rs. 55 LAKHS
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IN THE INTEREST OF INDIA'S PROSPERITY

THE COTTON TEXTILE INDUSTRY (1951-52 ANNUAL)

(A Review of the industry in India, and also in Pakistan, during 1951-52)

Editor: **M. P. GANDHI**

Introductory

Till March 1, 1952, no impartial observer could have noticed anything radically wrong with the cotton textile industry in India. Production figures were satisfactory, industrial relations were surprisingly smooth, and raw cotton was available in plenty—perhaps rather too much of the raw material, especially in the foreign varieties. Yet, it is now common knowledge that the industry seems to be caught in the whirlwind of what looks dangerously like a depression and the question is asked on all sides whether the present scheme of regulation of the industry, designated by the term 'control', is not indeed in need of wholesale changes. Such changes are necessary if only because the world's statistical position of cotton as well as of piecegoods has completely changed from one of comparative scarcity last year to a very uncomfortable surplus this year. Readers of the previous *Annual* will perhaps remember that, when discussing the global position of new textile industries in various parts of the world, we had clearly anticipated the present developments, particularly in respect of an excess supply of raw cotton and excess production of textiles, both relatively to world demand. It would be difficult to lay the finger precisely on any one cause or a set of causes, which have brought about the present overwhelmingly heavy buyers' market in textile goods. The present situation all over the world and particularly in India is the result of a cumulative impact of a number of forces which we shall analyse in detail in the subsequent chapters. But whatever the reasons for the so-called textile crisis, both industry and Government are certainly confronted today by a situation which calls for serious remedies in various directions. At present, public opinion is focussed more or less entirely on the *raison d'etre* of textile control in a situation like the present, and the demand for decontrol in several directions is strong.

The Price Slump

We consider the 1st March 1952, as an important day, because the markets started prophesying the Ides of March, which came in no

uncertain fashion! All of a sudden, prices of raw cotton and of other commodities figuring prominently in the export trade slumped to an extent that had not been anticipated. It was argued that the price slump had really been round the corner all along, owing to the stoppage of stock-piling in the United States and the general slowing down of re-armament; that the stringent credit policy initiated by the Government, through the instrument of a higher Bank Rate, had slowly and inevitably put a curb on speculation and overtrading and even on normal trading; that the deflationary policy of Government was beginning to tell on markets; that heavy stocks had accumulated in all the mills, deriving partly from the higher production in 1951-52 and partly from consumer resistance; that raw cotton prices in the United States and Egypt had begun to slide down and that the Indian mills by adopting a policy of 'wait and see' in regard to their cotton purchases brought about a severe decline in raw cotton, which in its turn was bound to bring out a crisis; that lastly, competition in the export markets had become extremely keen, thereby tending towards an adjustment of demand and prices at a lower level than before. All these and other reasons have been canvassed threadbare in the last two months, and it is the purpose of this *Annual* to discuss all those aspects in due course.

As far as the mills are concerned, they are faced with the problem of disposing of heavy stocks, and the unwieldy stock position has already compelled some of them to close the third shift, or to curtail working hours in other ways. Even the States Governments who are under obligation to lift these stocks from the mills have failed to do so because of poor demand.

In the midst of all the price deflation that has been going on in bullion, shares, and commodities, the average consumer has naturally called a temporary halt to his purchasing programme, with the result that the piecegoods merchants have been left with a considerable volume of stocks in hand. To carry such large stocks has not been easy, because the banks are very chary of providing the necessary finance. There has thus been a stalemate in piecegoods markets all over the country. It is a chain reaction, starting from the mills down to the consumer and the question is at what point remedies should be applied. When the Finance Minister, Shri C. D. Deshmukh, came to Bombay early in April 1952, a number of deputations of various trades including the textile trade waited on him to press for changes in the official policy. The main demand was for a re-orientation, if not the complete removal, of textile control as it has been so far understood and worked.

The shock of events and the difficulties, as we pointed out earlier, of tackling them at any one point naturally led to all sorts of solutions being propounded for alleviating the current distress. The millowners would prefer to dispense with production control altogether, so that only such cloth as was in demand both within the country and without need be produced. The distributing trade would like to be left as free as possible to send goods to any corner of India and to any destination

outside India. The raw cotton merchant for his part would like to see the end of control which, in his opinion, had always been worked to the detriment of the raw cotton cultivator. Thus, each section of the industry concerned in the production and distribution of textiles, has its own views, and the Central Government's position in evolving a policy designed to meet the maximum of all these points of view is hardly enviable.

Differences of opinion even in the *diagnosis* of the situation persist among various schools. For instance, the Central Textile Control Committee came to the conclusion on 10th April 1952, that there was no justification for total decontrol of textiles at present. The Committee apparently felt that, with a slight relaxation of the distribution control, stocks with the merchants and the mills would move on to the consumers and that the latter would get sufficient cloth at reasonable prices. It was also reported that the Committee felt that the present control measures should be relaxed as far as production was concerned. The millowners were keen on devising steps to improve the situation, so that production could be maintained at the existing level. While the Textile Control Committee felt in this manner, a different note was sounded by the Chairman of the Bombay Millowners' Association, Shri G. D. Somani, M.P., at the Annual Meeting held on April 14th, 1952. Shri Somani stated that it would be a grave error on the part of Government to dismiss the present slump as a temporary phase, and to hope that the situation would somehow adjust itself without special efforts. He made no direct plea for decontrol for cotton textiles, but the following words of his are worth quoting:—

> "If it is felt that control must be continued until and unless we reach at least the actual pre-war figure of *per capita* consumption, I would not quarrel with that decision, provided such a decision is preceded by a factual review of all the facts and circumstances relating to control, bearing in mind the ultimate need of the industry to organise and develop itself with a view to ultimate discontinuance of control."

He therefore pressed for a Fact-finding Enquiry into the Textile Control and also suggested the following remedial measures to avoid curtailment of production:—

1. The abolition, either on a permanent or temporary basis of the excise duty and the export duty on cloth.
2. The removal or relaxation of the restrictions at present in force on exports.

What makes the situation so very intriguing is that, while the accumulation of large stocks with the mills and outside suggests a state of glut, the available production is not yet sufficient for domestic consumption. After all, we cannot overlook that *per capita* consumption has fallen from the pre-war level of 16½ yards to 10 or 11 yards. It is of course true that the quantity of cloth made available for internal consumption rose from 16 lakhs in 1950 to 22½ bales in the following

year. Even then, the available quantity was below the 1949 figure by 1½ lakhs bales. According to Mr. Somani, textile output in 1951 amounted to 1,303 million lbs. of yarn and 4,076 million yards of cloth as against 1,174 million lbs. and 3,655 million yards respectively in the preceding year (1950). If, therefore, with supplies available, the consumer has not cared to increase his *per capita* consumption to the 1949 figure, the reason clearly is that his budget does not permit of such increased purchase. That is because prices have risen up; and what with excise duties, sales tax and middlemen's profit and all such elements which go to increase the selling price of cloth, the Government have indirectly compelled the consumer to take a lesser volume of cloth. Hence the demand for removal of the excise duty which, in the case of fine and superfine cloth, is really of fantastic proportions. It is doubtful whether budgetary considerations will allow the excise duty on cloth to be removed or cut down appreciably; but there is no doubt that such a step would greatly enhance the prospects of higher purchases by the consumer and relieve the stock position. In actual practice, one finds in the urban markets that cloth is already being sold at much less than the stamped prices, which means that the piecegoods merchant is paying the excise duty from his pocket, in an effort to get rid of stocks.

In all discussions centring round the crisis, repeated references are being made to the export trade in cotton textiles. The millowners themselves have admitted that their manufacturing profits in 1951 have been derived mainly from exports. That indicates what an important part the export trade has played in keeping production up during the last year (1951). Now the whole trouble is that, owing to acute competition from Japan, U.K. and others, the offtake of Indian cloth in outside markets has become considerably reduced, and an uphill fight is being waged by the exporter in India. If only exports had remained at a steady volume as hitherto, it would have been a great relief to the industry. But that is not the case and an influential section of the trade has pressed for a higher quantum of exports in 1952, with greater freedom to export to all countries. The destinational quota system of directing exports might perhaps be substantially relaxed and thereby the goods earmarked for certain countries which may have reduced their offtake might be released for export to other destinations. The export duty has bulked large in all discussions, relating to stimulation of exports. A strong representation was made to Shri Deshmukh when he was in Bombay recently (in April 1952), to abolish the export duty on cloth, particularly on coarse and medium varieties, or at least to reduce the duties. On the face of it, the Government of India, to our mind, are not likely to forgo such a handsome source of revenue. Moreover, to select coarse and medium varieties for export without duty would perhaps mean acute scarcity in the country in those varieties which are needed by the people. A case was also presented for refund of import duty on cotton for exports of cloth made out of foreign cotton. Otherwise, the production of fine and superfine varieties would have to be cut down.

These are some of the many issues that press on our attention if we are to evaluate the textile crisis properly. Our main purpose in this Introduction is to stress the fact that the roots of the crisis lie much below the surface and are spread in many directions. One will get only a warped picture of the causes as well as the remedies of the situation if proper importance is not assigned to such diverse factors as world economic trends, profitability of production with special reference to incentives, the real trend of consumption within the country, especially as it will impinge on a growing economy, and lastly, the future of textile exports in a world in which the industry has started springing up in many parts of the globe. Some observers, with their penchant for historical parallels, have already assumed the present conditions to be the starting point of a Depression akin to that of 1921, and 1938. Such over-simplification may present tidy theories but it also overlooks many of the fundamental respects in which the present situation differs from any of its kind that has gone before. One need only state the fact that, while the industry and the trade are obsessed about the advent of a depression, the Government still prefers to think that it is all only a downward adjustment of prices in a normal way. Time alone will show who is right.

The method that will be adopted in treating this subject in this *Annual* will therefore be to analyse the following aspects :—

1. World economic trends, with particular reference to India.
2. The trend of textile productivity.
3. The availability of raw materials, viewed in a national and international context.
4. The problem of retaining export markets.
5. The role that has to be played by Government and labour in maintaining production.
6. Future expansion or regulation.

It is our hope that treatment on these lines will give not only a sufficient cross-section of the industry but also put the subject in the proper perspective.

CHAPTER I

WORLD ECONOMY

The precipitate crash in commodity and stock markets that occurred early in March 1952, is a record both in its intensity and extension for over a decade. As we shall see, such panicky conditions had seldom been witnessed before. During the week ended March 8, 1952, a 19-point decline was registered in wholesale prices, according to a notification by the Economic Adviser to the Government of India. The index for industrial raw materials registered a fall from 469.5 to 406.3 in one week. Cotton, Jute and Groundnut seed declined by 15 per cent each, cotton

seed by 25 per cent, raw wool by 22 per cent. Business was at a standstill in almost all commodity markets. The cloth market in Ahmedabad showed a decline of about 30 per cent at one stage. The crisis everywhere compelled the stoppage of trading. The debacle on the stock exchange and the utter rout in the bullion market added to the prevailing scare. In the cloth market in Bombay, superfine cloth was selling at between 15 to 20 per cent below the stamped prices. This was due to the reported decision of the Bombay Government to lift only 4,000 bales out of their 16,000 bales quota for the month and a number of other States also followed suit. According to advices from Ahmedabad, more than 30,000 bales of cloth (nearly 1/3rd of fine and superfine production) were locked up and wholesalers were prepared to quote at 35 per cent below the stamped price on many types of cloth. Unlike Bombay, Ahmedabad mills had the transport problem also and the situation was really very bad, as with the fall in prices, banks have been asking for more cover from dealers and that made matters only worse.

Fiscal Policy

Even before the Finance Minister Shri Deshmukh touched off the slump by his firm discounting of any hopes of reduction in taxation and of other reliefs to industry in his speech before the Indian Merchants' Chamber, Bombay on 8th April 1952, the ground may already be said to have been prepared for a downward trend in prices by the current year's budget as well as the financial restrictions on credit. Between October 6, 1951, and March 6, 1952, there was a net contraction of Rs. 6.3 crores in note circulation which contrasted sharply with an expansion of Rs. 115 crores over the same period a year back. Besides, there was the higher bank rate, which had slowly but surely compelled traders to realise that hoarding would not be profitable at the prevailing interest rates. Domestic buyers had been slowly feeling the pinch and remained aloof, while foreign countries had been obliged to cut imports owing to balance of payments difficulties. When, therefore, peace talks in Korea were progressing, markets had been slowly adjusting themselves to a downward trend. The last straw which broke the camel's back was Shri Deshmukh's categorical statement that " the burden of taxation in India was not unduly heavy, taking into account the country's requirements and the limitations regarding borrowing. When compared with the level of taxation reached in the last budget of undivided India, the present level of taxation was much less onerous. . . . So long as the burden of taxation is not inequitable, I see no objection to capital expenditure being financed upto a point from revenue surpluses."

He also added a warning to trade and industry by adding that " any expectation that there is scope for economy in public expenditure to sustain large tax concessions, which is what you seem to regard as the main lubricant for turning the wheels of industry, will be wishful thinking on your part."

According to Shri Deshmukh, but for the Korean war, prices were bound to have followed a downward trend, and the violent reversal of that tendency brought in its train unbridled speculation. The recent speculative debacle marked the end of the expectations. Before the Chamber, he enumerated the measures adopted by the Government, such as relaxation of export control, and reduction or abolition of export duties which were primarily meant for assisting the country's balance of payments, but had only a fortuitous synchronisation with the slump. As regards credit facilities, he gave the assurance that credit for ensuring maximum production and genuine business activity was under constant review by the Reserve Bank.

Shri Madan Mohan Ruia, President of the Indian Merchants' Chamber, welcoming the Finance Minister in April 1952 had said that it would be facile to attach a definitely dis-inflationary significance to the recent developments, and that the violent fall in prices by disorganising the mechanism of marketing of primary products, might lead to a set-back in the purchasing power of producers. In his view, a downward stabilisation of prices had to be brought about largely by increasing production and availability of supplies and by lowering the cost structure of industry. He therefore stressed the importance of tax relief as an incentive and stated that the time had come for reduction if not removal of the duty on exports of cotton cloth and withdrawal of the destinational quota system. To stimulate internal demand for cotton textiles, he pressed for removal of the excise duty on cloth and lifting of the existing scheme of control. Regarding monetary measures, he felt that the previous decisions ought to be reviewed in the light of the slump and credit facilities should be increased. To the commonly expressed hope that the recent price decline would bring about any remarkable reduction in the cost of living, the answer was that such a reduction will not take place so long as the two main items of food, viz., wheat and rice prices, remained at the high levels and only recently, when the Centre removed the food subsidy to the States, the States Governments like Bombay had to increase food prices by 50 per cent. So far as the average consumer was concerned, therefore, any decline in prices had been offset by the rise in food prices.

The Government of India were at first inclined to dismiss the slump as a financial rather than an economic crisis which had been brought about by speculation, over-trading, hoarding and sudden unloading in an easy market, followed by a recession in buying. Whether deflation has actually started is still doubted in some quarters, even though there can be no two opinions on the coincidence of a return to the buyers' market with increased availability of supplies of goods. Prices for most commodities have gone back to pre-Korean levels.

Dr. Matthai's Analysis

According to Dr. John Matthai, the present slump in commodity prices does not presage a general depression. In a lucid analysis of the

factors, behind the slump, made by him early in 1952, he felt that the origin lay in the cessation of U.S. stock-piling, better international regulation of essential materials through international efforts, increased production, civilian and military, and world-wide credit restrictions and dearer money. While Western countries appeared to have faced this fall with equanimity, in India, it had brought about a temporary crisis. India with the largest and most actively functioning financial and commercial mechanism among the raw material producing countries, was the most sensitive to a fall as well as to a rise in demand for primary materials. Indian business, according to Dr. Matthai, " lacks a certain maturity of judgment and the capacity for taking long views in business matters ". The distinction between proper business and speculation often got blurred. He did well to stress the fact that, though the effective cause of the crisis had been over-trading, the genuine investor, trader, industrialist, and the grower had also all been affected by the crisis. In his view, the downward movement of prices had almost been stopped and there was a chance of stability at a lower level. He described as over-simplified the conclusion that the fall in prices would benefit the consumer; firstly, the fall had occurred in the prices of minor items entering into the cost of living and it was outweighed by the loss sustained by middle class, industrialists, and traders; secondly, the expected rise in prices of foodgrains through the removal of subsidies and the increase in procurement prices might still keep the cost of living high. The budgetary effect of the fall in prices would be felt, according to Dr. Matthai, not merely on customs receipts but also on excise and income-tax. He outlined the following fiscal measures to deal with the situation :—

(1) Relieving selling pressure within the country by adjustment of export duties. Export duties had their uses in emergencies but generally they were a precarious and unsound form of taxation and their maintenance and consequent reactions required continuous and careful watching.

(2) Loosening control of exports with reference both to their quantum and to their destination. The administration of export control, which even in normal times had been somewhat rigid, might be made flexible.

(3) Rendering credit conditions temporarily easier by the resumption of open-market operations and by relaxing the conditions on which commercial bills were accepted for re-discounting.

(4) Lessening the burden of taxation, at the same time effecting an immediate sizable reduction in public expenditure.

World Economic Indices

Interesting data are available regarding the world stock and commodity markets. The boom in Wall Street initiated in June 1949 ended in September 1951 when the Dow Jones industrial index rose from 160

to 276. On February 20, 1952, Wall Street turned lower at 258.5. Similarly, on the London Stock Exchange, also, the index number for industrials which was 115.7 at the end of 1950 rose to 138 at the end of September 1951 and declined to 111 in March 1952. Though world markets have followed more or less the same trend, the reasons are by no means uniform. In New York, the fall was due to the feeling that defence contracts in the U.S. are now less profitable. A fall in dividends was also expected. Moreover, election uncertainty is also having a restrictive influence, apart from the stoppage of stock-piling.

In London, the measures announced by Mr. Butler have created a heavy dis-inflationary psychology and prices are lower to the extent of 25 per cent after the budget. Unemployment is already evident and the economic machine is adjusting itself to the new policy which places the strengthening of pound sterling in the forefront.

The boom has definitely been slashed as far as raw materials are concerned. Moody's index for dollar raw materials rose from 400 on the day the Korean war started to a peak of 535, to come down again to 436 recently. The widely accepted view that prices and trade will recover when the re-armament programme advances has received a setback.

American business has become very cautious in many ways. Here and there opinions are however expressed that a downright depression will still be avoided by the following factors, viz., (1) the growing defence outlay, (2) the larger programme of economic development, (3) the possibility of a significant increase in consumer spending as well as business spending so as to pick up current supplies, (4) U.S. Government buying for stock-piling, (5) the fact that production of a number of primary commodities has not been keeping pace with the growth of world population and industrialisation. From these considerations, economists in America consider it premature to think in terms of a world depression. The National City Bank of New York, in its 1952 March Letter, points out that the fall of inventory demand, the reduction in consumer spending and the increase in savings contribute to order and stability, which are doubly welcome to an economy like the U.S. which has experienced continued inflation on account of Government spending, deficits and wage demands.

The End of the Boom?

There is unanimity of opinion that the boom initiated by the World War has actually come to an end and that softer days are ahead in 1953. The fall in demand and prices of commodities is really a world-wide phenomenon and the only question is whether there is going to be equilibrium at the current level or whether prices will taper off into a slump. According to the Economic Advisers of the White House, the U.S. will enjoy economic stability for the next few months upto the end of 1952 with a high level of industrial activity but without any serious inflationary pressures. Business economists are, however, not so optimistic

and they point out that the unprecedented industrial expansion of the last decade and the phenomenal consumer buying since 1945 have produced a resultant glut which, therefore, is a serious bear factor. In this context, the views of Mr. Colin Clark are of special interest since his earlier predictions made in 1940 have come true, viz., firstly, that the period of 1940-60 would be one of capital hunger and would see an upward trend of interest rates; secondly, that the terms of trade would change greatly in favour of primary products and against manufactured commodities.

Both these conclusions have been proved to be right by the experience in the 1940-50 decade and Mr. Clark's views in the present economic situation are therefore invested with a special interest. According to him, the modest recession of the present is not likely to deepen further, and the rewards of rural production must increase by another 50 per cent relative to those of industrial workers. Mr. Clark is convinced that, by 1960, manufacturing countries will be paying 90 per cent more for their imports of primary produce in terms of their exports than they were doing before 1940. Mr. Clark admits that if his optimism should prove to be misplaced, the result would be "unemployment, glutted markets, and uninvestable capital on one side of the line and inflation famine, political disorders and extreme nationalism on the other." (Lloyd's Bank Monthly Review March.)

Textile Slump

In 1951, the world output of cotton textile goods reached a new high level at 40,000 million yards, the main reasons for this being the growth of the industry in countries which were previously heavy importers between the two wars. As against this, world trade has remained at ¾ths of the pre-war volume. That gives an idea of the room for adjustment that still remains between supply and demand. Recent contraction of world purchases in cotton goods is attributed to the over-buying done during the past 1½ years and the difficulty of manufacturers in adjusting themselves to the fall in prices. Owing to inflationary pressures in each individual economy, manufacturers' costs of production have not been flexible enough owing to wage demands, the insistence on new benefits for the working class by the States such as unemployment insurance, housing, etc. The only relief coming to the manufacturer is by way of a lower price for the raw material. As against this, the costs of replacement have not moved down and the manufacturer has also to meet heavy taxation in almost all countries. The question whether textile prices are capable of great reduction would therefore hinge on whether there would be such a drop in cotton prices as to offset the still steady tendency in prices of other items entering into the cost of production. For the present, hopes are being entertained in India as well as in U.K. and elsewhere that the present surplus production can easily be absorbed by buyers, provided it can be borne in on them that there is no indefinite scope for a price decline. There is no doubt that consumer resistance has also played its part in contributing to a high

level of stocks with manufacturers, apart from monetary and other reasons. In the view of some, the first problem in the cotton crisis is *to break the belief in falling prices*, which can only be done through international action.

This is an interesting line of thinking. A Dutch Millowner sponsoring this view has said that as far as Europe is concerned, the E.E.C. countries should come to an agreement to cut total production by about 10 per cent, in order to provide the necessary shock to world opinion and create an impression that a stable level of production and prices is within sight. In his view, such shock would revive demand provided controls are applied with caution. Even Sir Raymond Streat, the British expert on the textile industry, appears to have expressed the view that the present slump is due to over-buying in the last 18 months and to the *psychological effects* of the falling market. Other European millowners do not agree with his view and point out that for European textile industries the comfortable period is over. They also feel that, when international trade in cotton and wool climbs out of the present depression, it may not return to the 1951 level. Former buyers like Argentine and Eastern countries are now producing their own textiles and a reversal of the terms of trade against former producers should be bargained for.

While these views of the international trade in textiles may seem to create a gloomy sense about the upshot of the world textile crisis, so far as this country is concerned, this economic crisis need have its impact on the Indian textile industry only in so far as export markets are likely to be affected. In another Chapter, reference is made to the increased competitive power of both Japan and U.K. and if the lower cotton prices are maintained, it will still be possible for Indian piecegoods to outbid other countries in export markets. There is no doubt, however, that if a world depression sets in, it will automatically drag this country with it. The hopeful sign is that the country's purchasing power may increase as a result of all the new projects. The *per capita* consumption of cloth is still very low. If the slack is taken up, the resulting extra demand would itself provide sufficient orders for the Indian textile industry and prudence would therefore seem to dictate that all efforts should be concentrated on such objectives. We would in such a context be only going back to the objectives for the textile industry which have been formulated in our *Annual* of some years back, viz., relying on the internal market rather than external. There is little doubt that the present world slump in textiles is going to teach us some very interesting lessons, if only we care to understand them.

World Trade in Cotton Textiles

The latest international statistics published by the International Federation of Master Cotton Spinners' and Manufacturers' Associations released in January last revealed the following changes :—Total spindleage increase in the world between January and July 1951 was 1,100

thousand. Japan's spindleage showed the biggest increase while in the same period Pakistan, Canada, the United States, Germany and the Soviet Union also showed increases in various degrees. France and U.K. actually reduced their spindles. The following table shows the extent of the changes, taking mule spindles and ring spindles together :

(In thousands)

	Total estimated cotton spindles. *January 1951*	*July 1951*
France	8,110	8,035
Germany :		
West	6,168	6,206
East	850	870
U.K.	28,968	28,152
U.S.S.R.	9,750	9,850
Canada	1,120	1,138
Mexico	988	1,114
U.S.A.	23,007	33,183
Japan	4,468	5,244
Pakistan	170	315
India	10,849	10,849

Notable features of this statement are that India's spindleage was unchanged, while Pakistan increased her spindleage, with France and U.K. *slightly decreasing their spindles. It may be pointed out that the* rise in spindles, which means an increase in manufacturing capacity, in countries like Mexico, Japan, and even U.S.A. occurred at a time when the export trade in textiles was lucrative. Therein also lies the *cause of all the troubles of world textiles today.*

As regards cotton mill consumption, there was a slight increase from 16,294 thousand bales *to* 16,997 thousand b*ales and the total year's mill* consumption of cotton in the world was 33,291,000 bales. The following analysis by varieties would be read with interest :—

	Six months ended *January 1951* (Bales)	*July 1951*
American	8,029,000	7,480,000
East Indian & Pakistan	1,636,000	2,130,000
Egyptian	606,000	734,000
Sundries	6,023,000	6,653,000
Total each half-year	16,294,000	16,997,000

As compared with the previous half year, viz., July 1950-January 1951, the U.K. used only 169,000 bales of American cotton as against 316,000 bales in the previous half year. Consumption of other varieties increased however. A smaller allocation of American cotton accounted for the increased use of other varieties, a trend which was apparent in the case of West Germany also. Canadian consumption of American cotton actually rose from 155,000 bales to 221,000 bales in the later half of the year, but in the U.S.A. itself there was a drop in consumption from 5,343,000 bales to 5,137,000 bales in the later half year. South Africa increased her consumption from 19,000 bales to 27,000 bales, of which only 10,000 bales were American. In Japan, consumption of all varieties was 862,000 bales (as compared with 729,000 bales in the previous 6 months), of which 407,000 bales were American.

WORLD PRODUCTION AND EXPORTS OF COTTON TEXTILES

(In million square yards)

Year	*Production*	*Exports*	*Exports as % of production*
1909-13 average	27,000	9,500	35
1924-28 ,,	31,000	8,550	28
1936-38 ,,	35,000	6,450	18
1950 ,,	37,000	5,500	15
1951 (estimate)	40,500	5,500	14

The index of production (1909-13 equal to 100) has risen steadily over the years from 115 in 1924-28 to 131 in 1936-38 and to 150 in 1951.

That shows how production has been steadily increasing all over the world. On the other hand, the export index has fallen steadily: 90 in 1924-28, 68 in 1936-38 and 58 in the last two years. Even absolutely, exports are only slightly more in 1951 at 5,500 million square yards as against 9,500 million square yards in the 1909-13 era.

These figures are taken from a recent "survey of world trade in cotton textiles" furnished by the International Cotton Advisory Committee (ICAC). From the point of view of world trade in textiles, the export trade really gives the clue as to post-war recovery trend. The fact that the total export trade in volume is only estimated to be 5,500 million square yards shows the end of the sellers' market, but the observation is also made as a long-term phenomenon that the failure of world exports to increase in 1951 means the resumption of the structural decline in the international trade in cotton goods, which was first noticed after the 1914-18 world war. In support of this argument, it is pointed out that the percentage of the world raw cotton consumption entering into cotton textile exports declined from 23 per cent during 1909-13 to 12 per cent in 1939 and to about 9 per cent (estimate) in 1951. This shows that, despite its recovery since 1945, the relative importance of

world cotton cloth trade continues to decline, as a corollary to the continuing industrial expansion in cloth importing countries.

Both relatively to total production and in actual yardage, exports have been declining while production has been increasing. The above table shows how the export percentage of total production was 35 in 1909-13 when total production was 27,000 million square yards; the same percentage has fallen to 14 in 1951 against total production of 40,500 million square yards. There are, of course, good reasons for the increase in world trade in cotton textiles between 1945 and 1950. The first is that, owing to war damage to plants and other shortages, the chief producers could not supply full quantities and world trade flourished on the pent-up demand. The rise in exports was further accelerated partly as a result of the speculative buying following the outbreak of the Korean war and partly owing to the short cotton crop. Thereafter, huge inventories and fall in textile prices became the order of the day and proved to be a stumbling block to both domestic and export sales. A further contraction of demand was also brought about when prices of primary commodities such as rubber and tin declined from previous high levels, as the amount of currency and income available in the cloth importing areas in the Far East depended on the rubber and tin prices.

The Future—1952

Looking to the immediate future, the lower cotton prices almost all over the world may stimulate buying and at least exercise a stabilising influence on the world cloth trade. The geographical shifts in world exports since the last war are well known—mainly, the rise of Japan and the impressive stature of India as an exporter. Asia is definitely in the ascendant in the world textile trade. On a long-term view, the factors that compel attention are the continuing expansion of the cotton industry in under-developed countries (often themselves cotton producers) and the emergence of synthetic fibre industries in large cotton consuming countries like U.S.A., U.K., Western Europe, Latin America, Japan, etc. The tendency towards increased national self-sufficiency in cotton textiles will, of course, bring about an increase in the world's cotton spindleage, as the figures given earlier show. Such an increase would offset any decline in capacity in the older producers like U.K., France, etc. The effect of this development on the future volume of international trade in cotton goods is considerable. Countries, which are at present expanding their cotton industries (example, Pakistan, Mexico, Africa) will soon become content with a smaller export demand than they previously anticipated, particularly, when remaining import markets also embark on industrialisation. We are, therefore, forced back to the two conclusions: first, world production will not decline but might increase; second, it would be becoming more and more difficult to increase exports. An era of acute competition in world textiles is therefore coming, raw cotton production being what it is.

The Rise of Rayon

The pattern of world demand for textiles is also going to be influenced in no uncertain manner by the growing capacity of the rayon and synthetic fibre industries. According to the I.C.A.C., world production of rayon alone—excluding nylon and complete synthetics—was nearly 35,000 million lbs., equivalent to 8 million bales of cotton. With the completion of new plants, world rayon capacity might reach 50,000 million lbs. by the end of the year. The increased production of rayon may, in due course, lead to the export trade in cotton textiles being displaced by rayon textiles. The tendency would become more pronounced if the rayon industry develops in cotton cloth importing countries like Australia and Latin America.

CHAPTER II

PRODUCTION AND DISTRIBUTION

Conditions in India were generally very favourable for textile production and the textile output of all mills in 1951 amounted to 4,076 million yards of cloth as against 3,665 million yards in the preceding year. With raw cotton readily available, it would have been surprising if output had fallen below that of 1950. As it is, the production for 1951 at 4,076 million yards is still below the figure for 1948, viz., 4,320 million yards. In view of the prolonged labour strike in 1950, there would be no point in comparing output with that year. For our present purposes, it would be much better to try to get back to the production figures of 1948 if possible.

It must be remembered that the Government of Bombay introduced in 1951 a 33 1/3 per cent cut in cotton mills' consumption of power and further directed the mills to work only 8 hours per day and 40 hours per week in the case of single shift working. Under the rationing scheme, working hours of the mills were reduced from 48 to 40 hours per week and mills in each group were asked by rotation to close down on one day per week. The full effect of this cut in power supply was not reflected in production figures for 1951, which would have made a much poorer showing if many of the mills had not installed their own generating sets. This partly offset the cut in power supply.

Cloth actually made available for internal civilian consumption amounted to 22½ lakhs bales in 1951, which compares with 16 lakh bales in 1950 and 24 lakh bales in 1949. The export packing restrictions which were introduced early in 1951 no doubt improved the availability of cloth for civilian consumption. It is a different story that the rate of offtake dwindled, resulting in stocks accumulating with the mills. The slackening of exports combined with the lesser volume of offtake to create a heavy stock position from which all mills are suffering at the moment. This is particularly true of those mills whose production pro-

gramme had been tuned mainly to export requirements. The moment these export goods were not lifted, such mills found themselves left with large stocks.

The following table gives the total production of yarn and cloth by mills in India :—

(Figures in thousands)

Period		*Yarn* (lbs.)	*Cloth* (Yards)
1946	.. ..	1,367,063	3,908,563
1947	.. ..	1,295,705	3,761,9[illegible]4
1948	.. ..	1,447,616	4,319,303
1949	.. ..	1,359,119	3,904,203
1950	.. ..	1,174,220	3,665,091
1951 January	.. ..	106,996	338,910
,, February	..	97,001	308,273
,, March	.. ..	103,173	325,698
,, April	.. ..	104,823	337,569
,, May	.. ..	109,655	348,648
,, June	.. ..	109,251	349,584
,, July	.. ..	111,346	350,684
,, August	.. ..	113,817	358,161
,, September	..	109,373	340,279
,, October	.. ..	109,653	334,385
,, November	.. ..	111,566	334,106
,, December	.. ..	117,207	349,889
Total for 1951	..	1,303,861	4,076,186

Power Rationing

Following the introduction of the rationing scheme in Bombay city, the Power Companies were taking a stock of all factors relating to supply and demand, with a view to ensure, firstly, that the estimate on which the original rationing was decided was correct, and secondly, that the rationing was proceeding according to plan. Incidentally, they were also making a careful study of all the available data, to ensure that savings of power accruing from whatever sources were utilised to the fullest advantage, and also exploring the possibilities of reducing the shut-down period. These investigations made it possible for Government and the Power Companies to announce towards the end of December, a reduction in the basic cut from 33 1/3 per cent to 23 per cent in the period October 1951 to June 1952 inclusive. In the improved scheme of things and with the power which was likely to be generated by the auxiliary generating

plants of individual mills, which had since come into existence, it seemed possible (a) to avoid the shut-down period in the closing months of the emergency, and (b) to keep the industry working on at least a 40-hour per week basis throughout the period October-June 1952. The successful working of the new plan was, however, dependent on two factors: namely, (i) the introduction of a revised scheme of rationing-cum-staggering of shut-down days, and (ii) the introduction of a revised scheme of pooling of power generated by individual mills through their own generating plants. Under the new scheme of staggering of holidays for mills, which was drawn up by Government from the old scheme, cotton mills which were originally arranged into six groups were rearranged into three groups with their shut-down days provisionally fixed as follows: Fridays and Saturdays for Group I, Sundays and Mondays for Group II, and Tuesdays and Wednesdays for Group III.

The proposals formulated by Government relating to the system of pooling of power generated by cotton mills were roughly as under:

All mills which had resumed 48-hour working would have to make available all their surplus power and energy to a common pool at a rate to be fixed per unit. A mill qualifying for 48-hour working which was subsequently found to be unable to fulfil the requirement was required to revert to 40-hour working making available any surplus energy generated to the common pool. Energy from the pool was not to be used to enable or maintain a mill or factory on full working. All mills under the pooling scheme should work at least 40 hours a week, provided they either made up the deficit of the rationed quantity or agreed to purchase from the common pool a quantity of energy sufficient to permit them to do so. After auxiliary generating plant or prime mover capacity had been installed in any mill or factory, such consumer would have first claim on his output after paying back to the pool the total amount previously drawn. Any surplus production could be accumulated by the individual mill until there was at least sufficient surplus for an extra day working. The mill or factory would then be allowed to work an additional day selected by the power companies or alternatively to sell the surplus to the power pool. Should there be any surplus energy in the pool towards the end of dry season, mills and factories, which could not resume 48-hour working, would be permitted to work additional days commensurate with the amount of surplus. Should, however, the pool energy be insufficient to maintain a 40-hour schedule or its equivalent upto the end of June or until sustained rainfall were experienced from 1952 season, then a complete shut-down would be imposed, but only for as many days as was absolutely necessary.

Accumulation of Stocks

We have noticed in the preceding paragraphs how the outlook for the industry suddenly became obscure by the fall in prices all over the world. A number of reasons operated to produce a glut in stocks, with almost all the mills. The turning point occurred from the 1st March

1952, when it was reported that most of the State Governments were disinclined to lift stocks against their quotas. It was stated that West Bengal would decline the whole of its superfine quota; that the Madhya Pradesh Government may take up only 30 per cent of the finer counts and even the Bombay Government was reported to be declining to lift a large part of its quota. All the time, the accumulation of cloth in Bombay and Ahmedabad mills was continuing at a rapid rate and causing many a headache to the mills, the merchants and the Textile Control authority.

At first, the obvious expedients were tried and the respective State Governments tried to issue warnings to their nominees that their allotments will be cancelled in the event of failure to lift quotas. Such warnings were hardly of any avail for the simple reason that there was a sharp contraction of demand and prices were falling anywhere upto 30 per cent. This only made the consumer wait for a further fall in prices and a complete stalemate was brought about as a result of mill production continuing, on the one hand, with stocks accumulating and on the other, without practically any clearance. In due course, by the beginning of April 1952, many of the mills particularly in Ahmedabad, were obliged to put up notices of impending closure of night shifts, even with the best will in the world. On the 11th April, 21 such mills in Ahmedabad had put up such notices and the threat of unemployment was really serious. Nor could the mills be blamed seriously in the matter as they were trying their best to clear the stocks by selling at prices which were lower by 10 to 40 per cent. The Government came in for a good deal of censure because the cloth manufactured at its instance and in accordance with notifications laid down by it under the Production Control Order was not lifted and the Provincial Governments themselves were responsible for many of the rejections. It was therefore a question of whether there was any meaning in continuing restrictions on production any longer when the essential condition of disposal was not fulfilled.

At the Ahmedabad Millowners' Association meeting, Shri Chandulal P. Parikh, the President, stated that the unsold cloth stocks were worth Rs. 25 crores (April 15, 1952). He pointed out that in normal times mills sold the production in advance and stocks of packed bales were generally negligible. Today, mills were offering their stocks at prices below the manufactured cost, according to him, and yet demand was confined to a few varieties. He said that if the demand in April 1952 again fell short of production, it would be beyond the capacity of many mills to finance the industry or bear the losses. Indeed, many mills have put up notices of closures accordingly. He argued that the working capacity of the mills would be destroyed if their liquid cash of Rs. 12 crores were utilised for meeting losses on sale of stocks; and not for the day-to-day running of the mills.

He, therefore, stressed the desirability of removing the control on production. After all, there was no purpose in putting restrictions on manufacture of certain varieties when the mills were being asked to find

buyers. He welcomed the decision to allow free export of fine and superfine varieties till September 1952, but also pressed for export of medium cloth made exclusively of foreign cotton, but free of duty. In his opinion, the full export quota would be achieved if mills were given a full refund of the import duty at the rate of three annas per lb. for cloth made out of foreign cotton. In conclusion, he called upon the Government to make an early announcement regarding the future price basis of cloth made out of Indian and foreign cotton.

Manufacture of Greys

Before we proceed to describe the steps taken to liquidate stocks with the mills during the crisis period, it is necessary to refer in passing to a circular which emanated from the Textile Commissioner in the middle of February 1952 requiring the mills to restore the 1949-50 schedule of cloth production in regard to greys. The circular raised a controversy on the issue of economic incentives since the industry claimed that the manufacture of greys was no longer remunerative. About 45 per cent of the textile production in 1951 comprised greys, as against 55 per cent in 1949-50. It was argued that as the labour costs indicated by the dearness allowance had already gone by 10 per cent and was going still further up, the prices fixed for greys were not economic. The fall in production in these varieties was responsible for the rise in premium on them which was anywhere upto 30 per cent over the control price. The official move in calling upon the mills to increase the output of greys might be correct therefore but lacked reality, so long as the mills did not find it remunerative. The official move in trying to get 50 per cent of the total production in the form of greys was calculated to stabilise the domestic cloth market without affecting the level of exports. It was expected that the output of the varieties in the superfine group, which were encountering sales restrictions, might diminish except for that were mills catering directly to the export market. By this method, the Textile Commissioner hoped to bring about a material change in the composition of the varieties produced internally.

And towards that end, the Government were prepared to relax the restrictions on spindleage provided the new spindleage was devoted to production of greys. Government were also prepared to provide allowances on a more scientific basis on cotton for cloth and yarn prices, the basis being the spinning performances as determined by laboratory test basis of whether the particular cotton variety is cheap or costly. In fact, this proposal has been welcomed by the mills. We shall return to this subject of further expansion of spindleage in a later chapter. Suffice it to say here that, in the present context of surplus production relatively to demand, the question of increasing spindles, etc., has not even an academic interest.

In the discussions between spokesmen of the mills and Government, the mills appear to have asked for freedom to produce certain varieties of cloth generally required by customers which are, however,

prohibited under the control scheme. Similarly, many suggestions were made to facilitate an expansion of exports, but the initial reaction of Government was not to be hustled in any action in meeting the crisis, apart from relaxation of the distribution control. The official view apparently was that there was not so much surplus in textile production and that the average stocks of the mills were normal. The implications of the crisis were being closely studied and the Textile Commissioner spent many days in close consultation with the Ministry of Commerce and Industry. It was obvious that a tendency to hope for relief as a result of relaxation of distribution control persisted in official circles. These steps may, therefore, be briefly noticed here.

Steps taken to meet the Crisis

A Press Note issued on 15th March 1952 stated:

"In view of the existing uncertainties in the market in respect of Indian cotton, the Government of India has decided that prices fixed in respect of coarse and medium varieties of yarn and cloth for the current quarter will continue until the end of April 1952. It has been, however, decided that for the quarter of April-June 1952, the prices of fine and superfine cloth will be reduced by five and nine per cent respectively and those of fine and superfine categories of yarn by 7 and 15 per cent respectively.

The revision of the above prices has taken into account the quotations for cotton prevailing in the Bombay market in the first week of March 1952 and is also in accordance with the recommendations of the Tariff Board." (March 15, 1952.)

The press note also stated that the Government of India will not allocate superfine and certain varieties of fine cloth to the States after March 31, 1952, and mills will, therefore, be free to sell such cloth to buyers of their own choice.

These and certain other measures of relaxation over distribution control of cloth have been taken, according to the official press note, in order to encourage speedy movement of these varieties of cloth to markets and make them freely available to consumers throughout the country. As regards other varieties of cloth allocated to States Governments, it has been decided that whatever is rejected by them or is not taken and paid for by their nominees within the period of validity of the allocation order will be allowed to be sold freely by the mills to buyers of their own choice. The Central Government's decision has also been necessitated by the fact that a number of States including Delhi and the Punjab, declined to lift their full quota and wanted a more liberal allocation of coarse and medium varieties of cloth.

It is officially stated that ample stocks of these varieties of cloth exist in various States, and they are likely to be increased still further by production of new cloth as the result of the large arrival of raw cotton from the U.S. Superfine and fine cloth manufactured in this country

represents 35 to 40 per cent of the total cotton textile production. (March 17, 1952.)

These relaxations did not appear to go far enough to resolve the crisis and as a result of further representations, a fresh announcement was made on April 19, 1952, as a result of which Government of India decided to permit mills to sell coarse and medium cloth to buyers of their own choice upto 80 per cent of the cloth packed instead of 50 per cent as hitherto. The concession was to continue only for the months of May and June 1952 and was given so as to relieve the accumulation of stocks.

As a result of this decision, normal trade channels have been enabled to come into the picture and have offered an opportunity to the mills to produce what the consumers require. It was generally expected that, after ensuring the manufacture of adequate quantity of dhoties and sarees, the Government would in due course relax some of the existing restrictions on the production of varieties of some of the popular and cheaper varieties of cloth. Despite all the representations, the Government of India has set its face against increasing the export quota, or reduce the export duties as suggested by so many. It may be mentioned here that, as far as exports are concerned, for the 6 months ending June 1952, Government have permitted export of 100 million yards of coarse and medium cloth and 150 million yards of fine and superfine cloth. This quantity is in addition to the carry-over from last year's quantity to the tune of 150 million yards. The anxiety of Government is that excessive encouragement to exports would prejudicially affect the stock position in the country and again create artificial scarcity.

Official circles were not prepared to be convinced that the mill-owners have played their part in the game in helping to tide over the present crisis. Moreover, they wanted some time to elapse so that the effect of all the recent relaxations could be properly adjudged. The Government were keen on suggestions from mills which would help to relieve the existing accumulation, provided such suggestions did not take the form of a demand for abolition of production control altogether or for removal of export duties completely, both of which were easy to ask for but really raised many matters of importance. The Government are hoping that Indian millowners, instead of preaching to Government as to what should be done, would show zeal in exploring new markets for cloth. Another matter in which the Central Government are anxious is in regard to the attitude of some States in tackling the crisis. Inter-provincial movement of cloth is hampered by the autonomous zeal of some States who have put in restrictions on the movement of cloth to protect their own dealers. Unless surplus stocks can freely move and can be sold, their liquidation will be a slow and painful process.

CANCELLED

CHAPTER III

EXPORTS

In the previous chapter, we have noticed how the Government have made special efforts to clear stocks of fine and superfine cloths by permitting exports and free sales. One can truthfully say that the Government have never properly understood the role to be played by the export trade in the textile industry. The attitude towards the export trade has never been one based on an absolute standpoint. At one time, exports were regarded as part of the food pipeline to earn foreign exchange and, therefore, the maximum exports consistent with the necessity to safeguard internal supplies were encouraged. At another stage, even when conditions in world markets were such as to ensure greater offtake and Indian cloth had really a lot of competitive power, we found the Government tardily agreeing to meagre increases in exports, doubtless, out of fear that internally a state of scarcity would be created. During the recent crisis and since, great solicitude has been expressed for promoting exports as much as possible, i.e., exports are regarded as the overflow pipe, which is hardly a tribute to the business instinct of the importer abroad. It is thus that export policy has always been of the nature of patchwork, guided by immediate (and not far-sighted) consideration of the day, if not the hour. The frequent criticism of the cloth export policy as 'too late and too little', often found justification in facts.

The rise of India to a position of pre-eminence in the world cotton export market is now recent history and one would have liked to see our Government approaching questions like the quantum of exports and the export duties in a spirit based on the determination to retain our overseas market if not to expand them. Textile production within the country has since 1948 been definitely above the famine line as far as internal consumption is concerned. And the Government could certainly have approached the export problem with a less heavy mind than it has shown so far. Today, when reports of huge stocks accumulated with the mills come pouring in, the Government rather belatedly announce extra export quotas for fine varieties, while still showing reluctance towards exporting coarse and medium goods. (April 1952.)

Lack of Steady Policy

The various restrictions on cloth exports in 1951 which we shall notice below could perhaps be explained as a prelude to the general elections of 1951-52. But lack of prudence was writ large on the face of the export policy when other restrictions were put on early in 1952. It was plain to most people that all over the world buyers' markets had become the order of the day and with the end of stock-piling, a state of saturation had been reached. In fact, the principal textile producers had started reducing their production to a considerable extent and laterly, Japan has shown readiness to dispose of goods at 40 per cent

lower prices within the past 3 months (April 1952). The proper time for Government to have increased the quota was somewhere in November last (1951), when some of the foreign markets had not become so heavy with surplus stocks. In the export market, both nimbleness and quick decisions are required and it is doubtful whether official policy could boast of these virtues at any time. In spite of the fact that Indian cotton was cheaper than world cotton, Indian mills would find it very difficult to sell medium and other varieties, with the additional cost of 25 per cent export duty. A stage has been reached when, owing to the capricious nature of export policy, foreign merchants would rather go in for textile goods of other countries than that of India. Haphazard increases in duties and changes in destination of operable quotas, hedged in by other restrictions, and frequent and almost baffling alterations of conditions, have had their inevitable result.

For the half year ending June 1952, the Government of India have permitted export of 100 million yards coarse and medium cloth and 150 million yards of fine and superfine cloth. As the surplus stocks in the country are mostly in the fine and superfine varieties which were made out of foreign cotton imported into the country, the authorities would like to get rid of the surplus fine varieties by exports but there is a snag here. There would be hardly any export outlet for cloth made out of foreign cotton.* Even cloth made out of Indian cotton will be difficult to sell on account of present world conditions. The fact is that high prices were paid for all the foreign cottons and naturally the selling prices computed by the Textile Commissioner will also be much above the capacity of foreign markets to pay.

One solution of the present situation will be to give greater freedom to mills in regard to manufacture so that they may be able to make such lines as would command a ready market abroad. Incidentally, in the process, they might be able to manufacture at a cost lower than the price fixed by the Textile Commissioner under his formula.

The balance sheets of mills for the year 1951 show a higher level of profits than for 1950, but as Shri G. D. Somani, the Chairman pointed out at the Annual Meeting of the Bombay Millowners' Association in April 1952, the 1951 profits are not 'manufacturing profits' as they were derived mostly from export and other sources. It is certainly true that in the case of many mills, particularly those engaged in the manufacture of medium and coarse varieties, they would have reported losses but for the support available to them from the higher export prices. That state of affairs has rapidly disappeared now as a result of the depression that has overtaken all commodity markets and the consequent import cuts announced by various countries. As we shall see elsewhere, many mills in Lancashire closed down in March 1952, while the situation in Japan is even more acute. Almost all the far Eastern Markets are glutted with Japanese goods and that too at very low prices. The capacity for absorp-

* Government can consider refund of import duty on foreign cotton, for such cloth, when exported.

tion of fresh supplies in these markets has become very exiguous. Another interesting point was made by Shri G. D. Somani. He observed that partition had left India with the problem of finding a regular export market to absorb 1,000 million yards of cloth which was previously being consumed by the territories now forming Pakistan. It would be extremely difficult to secure an outlet for 25 per cent of Indian manufacturing capacity which is what it amounted to, in competition with Japan, U.K. and U.S.A., unless our industry is geared up to a very high degree of technical efficiency and rationalisation, which alone would help to reduce the cost per unit of production.

Export Quotas for 1952

Towards the end of December 1951, Government announced their cloth export policy for the first half of 1952, according to which a quantity of 250 million yards of mill-made cloth would be licensed for the January-June 1952 period to all permissible destinations. This quantity was exclusive of a carryover of 180 million yards from the 1951 quota. Out of the above 250 million yards, only 100 million yards would consist of coarse and medium qualities, the balance of 150 million yards being in fine and superfines. All restrictions in packing for export were removed with effect from 1st January 1952, but in regard to licences to be issued for the period January-June 1952, only 40 per cent would be permitted to be shipped before the end of March 1952. All confirmed licences issued between 1st March 1950 and 31st December 1951 which were valid for 6 months upto the end of 1951 were granted an extension in shipment period upto 30th June 1952.

Later, Government announced a destination-wise split-up of the quota of 250 million yards as follows :—

12.5 million yards of coarse and medium 12.5 million yards of fine and superfine	To Afghanistan.
31.4 million yards of coarse 14.6 million yards of medium 11.5 million yards of fine cloth	To Pakistan.
41.5 million yards of coarse & medium cloth and 126 million yards of fine and superfine	For all other destinations

No exports were to be permitted to the following countries :—

Macao, Tangier, Djibouti, Aden, Malaya, and Hongkong.

20 per cent of the licences was reserved for export for new-comers and the balance by established exporters. The quota reserved for new-comers consisted of 8.2 million yards of coarse and medium and 25.2 million yards of fine and superfine cloth. Government further announced that general licences would be issued to exporters with the stipulation that, in the case of coarse and medium cloth, not less than 20 per cent of the quantity covered by the licence were to be shipped to Burma and 70 per cent to Australia; and in the case of fine and superfine cloth, not less than 6 per cent of the quantity covered by the licence should be shipped to Burma and 8 per cent to Australia.

The Bombay Millowners' Association was glad over the discontinuance of preferential quotas to certain mills classified as new, super-efficient and uneconomic. They also welcomed the decision to withdraw all restrictions on packing for export after 1st January 1952 and to earmark a reasonable proportion of the overall poduction for export during the first half of 1952. They had, however, some objections to some of the new features in the export policy. The fact that Government had thrown open the Pakistan market to all, even irrespective of whether they were in the cloth trade, would mean that a large number of applications would be made which would work against honest applicants who were dealing with Pakistan before. Similarly, in the case of Australia and Burma, the Association felt that it was wrong in principle to force exporters to enter a market with which they had no dealings in the past which is exactly what would happen if all established shippers were compelled to export the prescribed percentage of coarse and medium and fine cloth to Australia and Burma. They felt that previous practice might have been followed in this connection as thereby 80 per cent of the Australian and Burmese quotas would have gone to the established shippers to these markets and 20 per cent would have gone to new-comers. Again, the principle applied to Afghanistan was not consistent with that applied to Australia and Burma and the Association would have preferred the entire quota to be divided amongst established shippers and new-comers in the ratio of 80 : 20 without any restrictions as to destination. In short, the objection was to diverse licensing methods being adopted by Government where an uniform licensing procedure might have been better for all destinations.

Established Exporters vis-a-vis Others

There is no doubt that these restrictions and diversions of quotas would create hardship to a large mass of established exporters, and would react adversely on the export trade itself. For instance, it is pointed out that the Australian market had been overstocked with cloth owing to delayed shipments from India and U.K. If established exporters were compelled to sell 70 per cent of their quota of coarse and medium goods to the Australian market already overstocked, it will only result in (1) selling under pressure at very low prices which would mean less earnings of foreign exchange, (2) failure to sell in this market (Australia) and the quota lapsing in consequence. As regards 20 per cent of coarse and medium quota compulsorily to be sold by established exporters to the Burmese market, the Millowners' Association, Bombay, submitted that that market being full of cloth, there might be resistance to buying unless the prices were reduced very substantially. Apart from the considerations stated above, established exporters, who might not have previously traded with Australia and Burma, would be put to considerable difficulty in effecting sales of the major portion of the quota in these markets, and in many cases this could be accomplished only by offering through another party who might have connections there. The established exporters would, thus, have to sacrifice a fair portion of their

margin to the intermediary in order to secure business. The claims of some of the other natural markets like East and West Africa, New Zealand, Ceylon, Rhodesia, Mauritius and Malaya where there was a good demand for coarse and medium cloth, had been ignored. After fulfilling the quota for Afghanistan and Pakistan, and after effecting 90 per cent of sales of coarse and medium cloth to Australia and Burma, the established exporters would have hardly any coarse and medium cloth left to satisfy their regular customers in the above markets. Established exporters were also seriously handicapped from exporting coarse and medium cloth to unspecified destinations *vis-a-vis* new-comers. While the total quota of established exporters would be 3.32 million yards, new-comers would have 8.3 million yards.

Far Eastern Markets

The exclusion of Singapore and Aden from the list of permissible destinations was also surprising as these ports had been traditional buyers of Indian piecegoods and have fulfilled a very useful role as financiers and distributors (entrepot) of Indian piecegoods to their surrounding markets. Indonesia was a case in point; there was a good demand for cotton piecegoods which, however, could not be met wholly owing to financial reasons. The marine risk insurance and storage insurance charges in Indonesia were about 25 and 30 per cent respectively higher than those for Singapore, and so the incentive to take goods to Indonesia was, therefore, much less. It was understood at the time the quotas were allotted that, if established exporters failed to effect sales to Australia and Burma and the allotted quota was not taken up by the end of March 1952, the Government would review the situation and permit diversions to other destinations. After all, it must be remembered that Government has concluded a number of trade agreements to these countries as a result of which it is obligatory on them to export piecegoods, but if the importing countries did not avail themselves of the quotas, it would be their own fault. The only snag in waiting to see whether these quotas were availed of is that, during the period of waiting, valuable time is lost as the interval is naturally utilised by exporting countries like U.K. and Japan, to dump their goods in those markets and by the time the Government of India change their allotment, the demand might no longer be there.

Lancashire Agitation

Undoubtedly, a radical change has come over both Lancashire and Japan. What serious rivalry exists between these main exporting countries, including India, is considered in detail in a separate chapter. Suffice it to say that, Lancashire mills who had problems of labour shortage have now reached a stage when they must push up their exports, the alternative being closure of mills and diversion of operatives back to the armament industries. In fact, a tremendous agitation is going on in Britain and the Board of Trade is being assailed by the Lancashire textile industry to help exports by dropping the purchase

tax and by putting in clauses in various trade agreements whereby it would be incumbent on foreign countries exporting goods to Britain to take in return specified quantities of Lancashire goods.

We shall refer in passing to the agitation worked up in Britain over the question of importing Indian grey cloth into Britain. The total of grey cloth supplied to Britain by India amounted to 3.2 million sq. yards in 1949; in 1950 it amounted to 71 million sq. yards, and in the year 1951 it was over 110 million sq. yards. Under Imperial Preference all these cloth entered Britain free of duty. Not for nothing is India a Member of the Commonwealth! Of course, a large part of this grey cloth is imported into Britain for converting and subsequently for re-export. Even then, according to the India Section of the Manchester Chamber of Commerce, a basis exists for reciprocity on the part of the Government of India who are, therefore, called upon to broaden their importing licensing programme and to permit some of the better cloth textiles of Lancashire to be imported in India. In fact, the Cotton Board Mission last year represented to the Indian Government on this matter, but was told that financial reasons dictated the necessity to have a licensing system of imports into India. Anyway the point is that Lancashire feels that it is deprived of reciprocal advantages of preferential duties granted under Imperial Preference.

Exports of Greys to Britain

Opposition to the continued importation of Indian grey cotton cloth into Britain was voiced by Sir John Grey at the Annual Meeting of the Lancashire Cotton Corporation early in 1952. He said, "We are willing and ready to make sacrifices . . . but we do not want to make them in order that the Japanese and the Indian can have a better standard of living than we have and have an abundance of trade at our expense." These imports certainly helped Britain at one time especially when the mills engaged in finishing operations would have been idle but for the imports of grey cloth from India. The fact that these imports of grey cloths are unnecessary in the present stage of the British industry does not, therefore, entitle the leaders of Lancashire to speak so vehemently about India's export of grey cloth to Britain. The chances are, therefore, that in 1952, Britain is bound to cut down these imports from India. A cut, we believe, has already been enforced for the first quarter in the current year (1952).

We mention this only to show that in view of the depression in the foreign markets, the Indian Government should not tie down exporters to specific markets. The interests of the export trade would be better served if exporters are given a more balanced quota of coarse, medium, fine and superfine cloth and are left free to some extent, to exercise their discretion as to the markets in which they should sell to obtain the best possible prices. As far as possible, every facility should be given to help exporters to retain their connections in regular markets, taking a far-sighted view of the matter.

Millowners' Suggestions

The following suggestions were put forward by the Bombay Millowners' Association in February 1952 when the export policy was announced :—

(*a*) The overall quota of coarse/medium and fine/superfine cloth should be more evenly balanced by increasing the quota of the former categories by 25 million yards and reducing the other categories by an equal quantity. In other words, while the Association felt that the overall quota of 250 million yards for the first half year 1952 was reasonable, it should be divided equally between coarse/medium, and fine/superfine.

(*b*) If possible, Government should consider whether they should not informally ascertain from the Australian High Commissioner in the country whether, in the present state of the Australian market, the Australian Government would still insist on a specified quantity of cloth to be shipped there, and in the event of the Australian authorities being not very particular about this, compulsory sales to Australia should be waived.

(*c*) In any case, in the event of buying resistance from Australia and Burma, the time limit for re-allocation of quotas to other destinations should be considerably shortened. Thus, whatever quotas exporters were not able to sell to Australia and Burma by the end of February 1952, should be permitted by the first week of March 1952 to be diverted to other destinations where there was still some demand for India-made piecegoods. The Association strongly recommended that Government might accept these suggestions, as in the event of waiting till the end of March 1952 and a later survey thereafter for deviation of quotas, it might result in India's competitors like the United Kingdom and Japan meeting the demands of these markets in the intermediate period.

The Association also drew Government's pointed attention to the rapid changes which had been taking place in all overseas markets in the last three months, where they had shifted completely from a seller's to a buyer's market, and any artificial restrictions on the export of textiles from India might mean a permanent loss of valuable markets, which would take many years to regain. The 25 per cent duty on coarse and medium goods was a major handicap to Indian exporters. This duty on the overall price of the cloth was equivalent to 50 per cent duty on the price of Indian cotton. This 50 per cent almost offset the difference between the controlled price of Indian cotton and the price of American cotton, which was available freely to India's main competitors —particularly Japan. In view of this, the Association felt that if Government desired the entire quota for the first half of 1952 to be exported, then they should withdraw all artificial restrictions and allow normal trade channels to function to balance demand and supply.

Towards the end of February 1952, Government announced that they had decided to reduce the quantity of coarse and medium cloth exportable to Australia from 70 per cent to 40 per cent of the licences for coarse and medium cloth held by exporters. In other words, licence-holders were required to ship only 40 per cent of their quota for coarse and medium cloth to Australia, and the balance of 30 per cent was made available for export to any permissible destination other than the six excepted destinations.

Export of Pseudo-Fine Cloth

Early in December 1950, the Textile Commissioner directed mills to stop forthwith entering into contracts for export or sale for export of cloth against licences for fine and superfine cloth unless such cloth was made up of (a) warp above 35s and weft above 37s in the case of fine cloth; and (b) warp of 48s and above and weft above 37s in the case of superfine cloth. Government, however, granted licences as a special case for shipment after January 1951 in cases where contracts had already been entered into by exporters with the mills prior to the date of announcement of the ban on export of such cloth and letters of credit had also been opened by overseas buyers in fulfilment of the contracts. The periods of validity of these licences along with licences for other kinds of cloth were extended by Government from time to time, and by a public notice issued on 17th December 1951, a further extension was granted in respect of all licences upto the end of February 1952. Government, however, subsequently announced that no extension beyond 31st December 1951 nor any other concession would be granted in respect of licences held for the export of pseudo-fine cloth.

Protests were lodged by the mills against the sudden withdrawal of the concession relating to extension of the period of validity of licences in respect of pseudo-fine cloth. They pointed out that, on the strength of the earlier announcement, mills had already informed their overseas clients that all valid licences outstanding at the end of 1951 would be extended. After this official announcement, their position had become very embarrassing. The relationship between manufacturers and exporters in India and their overseas constituents had already become unhappy in 1951 due to frequent and abrupt changes in Government policy; and on top of that, the present directive would, it was feared, strain further the relationship. Further, it was also pointed out that Government's intention to permit the export of carryover from 1951 quota aggregating to about 180 million yards would not be fulfilled, if the export of pseudo-fine cloth was prohibited, since a good portion of those 180 million yards consisted of that cloth only. Moreover, the mills pointed out that, if Government's intention was to discourage the export of this variety, they should have given sufficient notice. As things stood, confirmed contracts duly supported by valid licences were held by many mills for the export of this cloth in large quantities and such contracts were under completion. Suspension of exports would, therefore, mean

a heavy loss to such mills as these varieties manufactured outside the scope of the Production Control Order could not easily be diverted for sale in India, and in any case the penalty pricing given by the Textile Commissioner would involve mills in heavy losses. In response, Government issued a further announcement extending, in the first instance, the period of validity of licences for export of pseudo-fine cloth upto the end of February 1952 which was subsequently extended again upto the end of June 1952 by a later announcement.

Cloth Exports to Singapore

An official notification issued on March 23, 1952, by the Joint Chief Controller of Exports, Bombay, stated that restrictions so far imposed on export of cotton piecegoods to Aden, Hongkong, Malaya (including Singapore), Djibouti, Macao and Tangier had been removed straightaway. These restrictions had been imposed because these ports were not consumer centres but "entrepots" from which re-exports of Indian piecegoods were often effected. The notification added that licences held by exporters for the period January-June 1952 for destinations other than Pakistan, Afghanistan, Burma and Australia, can be utilised for export to any permissible destination, including the six referred to. Diversions of destinations will also be allowed against licences carried forward from the previous licensing periods in *bona fide* cases where cable-evidence is produced to show that the original consignee has declined to take the goods. This procedure will hold good even in cases where licences were held for export to special destinations. For purposes of benefiting from the above concessions, licences for pseudo-fine cloth will be treated on par with other licences. In cases where exporters holding licences for pseudo-fine cloth require permission for processing, that will also be granted.

Business circles and officials in Singapore welcomed this announcement. They said that this action would benefit the country's trade and industry particularly in view of the import restrictions on Japanese goods announced there recently. Mr. Assomull, President of the Indian Chamber of Commerce, Singapore, said "Singapore may be unable to take up as much goods as last year due to world depression and prices of Indian textiles being uncompetitive with those of Japan". Referring to the export duty of 25 per cent on Indian piecegoods, Mr. Assomull stated: "As far as I know, there is no export duty on textiles in any other country of the world and India should relax the same". Market reports indicated that it was almost well stocked with fine and superfine varieties. Demand for coarse and medium cloth was steadily declining and was expected to be at least 30 per cent lower than last year. Stocks in Malaya at present (1952) are estimated to be 70 million yards. India was Malaya's largest supplier in cotton textile last year (1951), the quantity being 160.3 million yards out of total imports of 360.4 million yards.

Devaluation of Yen

Rumours regarding a move on the part of Tokyo to devalue the Japanese Yen since March 1952 have caused a renewed flutter in the export market. Pakistan is said to have suspended import orders from Japan for the time being in expectation of cheaper purchasers. While the reports have no official basis, textile circles in the city feel that, even if Japan devalues her currency, with the present state of the international export markets, it will make little difference to India. Australia has cut her offtake to 20 per cent of previous purchases while Singapore, Aden, and East Africa have all curtailed their imports of Japanese cloth. Any modest change in the price pattern will, therefore, make little difference to the total demand from the importing countries.

From a slightly longer-term point of view, the effect of any change in the Japanese currency value may, however, prove drastic on India and the U.K. Comparative price studies show that Japan is presently scoring over Indian textiles in virtually every market. In Pakistan, the f.o.b. price of Indian Grey Cald. Long Cloth (Fine) 42" × 38" works out to Re. 1-2-0 per yard, while the rates of comparable Japanese varieties are around 15½ annas. Cald. shirting fine is sold by Japan at 13 annas against the Indian rate of 14 as. 2 ps., printed voile at 14 as. against the Indian rate of Re. 1-0-10, mulls at 12 as. aganist 12 as. 7 ps., coarse grey sheeting at 12½ as. against Re. 1-1-1 and Bld. Calico medium at 15 as. against Re. 1-3-2. In the last two items, the difference is almost entirely due to the export duty of about 3½ as. In Aden, mulls are quoted at 12½ as. against the Japanese rate of 11 as. In the Burmese market, Indian cloth is at a disadvantage ranging from 1 anna a yard to 4¼ annas. Ceylon gets Japanese grey sheeting (coarse) at 13 as. against the Indian rate of Re. 1-0-7, long cloth at 15 annas against the Indian rate of Re. 1-3-2, and printed long cloth at 11 as. against 12 as. 7 ps. In Australia, the price disadvantage works out to about 1 anna 4 ps. in the case of grey sheeting while Japan is able to sell corresponding styles at 2 to 6 annas cheaper in Malaya and Singapore. The position, however, is unlikely to become desperate. With the recent slump in Indian cotton, the rates of coarse and medium varieties can be expected to be revised downwards by the Government by about 6 to 8 per cent from May 1952. In addition to this, if the export duty on coarse and medium varieties is also abolished or materially reduced, it may be a hard task for Japan to price Indian cloth out of her traditional markets. This may, however, mean that the coarse and medium varieties will strengthen their hold on the export market at the expense of fine and superfine cloth exports. Here, the position can be partly rectified by a reduction in the excise duty and/or refund of the cotton import duty on cloth made out of imported cotton and diverted for export, on the lines suggested by the Chairman of the Ahmedabad Millowners' Association.

CHAPTER IV

THE U.K. TEXTILE INDUSTRY

We have already referred in detail to the state of the world export markets and in particular to that of the United Kingdom. Recent curtailment of productive activity in the U.K. textile industry has sharpened attention on many questions, of which the import of grey cloth into Britain from India is one. Lancashire had built up a large re-export trade in these processed grey cloths. We have also seen how the Board of Trade has come to the conclusion that the import of grey cloth was no longer necessary; indeed weavers were complaining that these imports were so much in excess of legitimate requirements that they were hampering export delivery of home woven materials by causing delays at the finishing stage. India alone supplied more than 100 million yards of grey cloth in 1951. The threat of unemployment in the textile industry is very real and queues are the order of the day in most of the textile centres in the U.K. The British worker feels the situation more acutely because it was with very great difficulty that Lancashire Mills were able to obtain a full deployment of labour and that, too, at the expense of the armament industries. It may be said that these textile workers can again be sent back to armament production, but the average worker never relishes such frequent changes in his occupation, apart from the fact that these workers had all along been engaged in the textile industries.

Prosperous 1951

The depression of 1952 is a sharp reminder of the highly prosperous state of the textile industry in the U.K. in 1951. In the year as a whole, the volume of textile exports was slightly above the average for 1950. Prices, however, were rising rapidly until the fourth quarter and the value of all textile exports in the year—£537 million—was nearly 30 per cent higher than in 1950, and represented nearly one quarter of the country's total exports. Here are the impressive details, reported by the Board of Trade:—

	1950 £	1951 £	Increase last year over 1950 £
Cotton textiles	158,363,098	209,175,539	50,812,441
Wool textiles	140,432,026	176,824,107	36,392,081
Rayon and silk	50,142,856	64,287,488	14,144,632
Other textiles	30.298,226	40,284,457	9,986,231
Apparel	35,582,449	46,116,241	10,533,792

In terms of quantities of yarn and cloth exported, the result, especially in the closing months of the year, were less satisfactory than these high values suggest, but a notable feature was the rayon industry's increased quantitative share of the all-textile export total. The volume

of cotton piecegoods exports also recovered after the previous year's setback.

Export of Cotton piecegoods from U.K.

(In thousand sq. yards)

	1949	1950	1951	1952
Grey unbleached	51,533	48,327	51,222	
White bleached	228,558	195,955	215,983	
Printed	338,615	325,483	316,859	
Piece dyed	225,188	197,419	213,207	
Coloured yarn (dyed)	59,684	55,244	50,882	
Total	903,578	822,473	865,153	
	(£105,706,352)	(£100,296,504)	(£132,191,722)	

Markets which increased their takings of cotton piecegoods from the U.K. were the following :—

Export of Cotton piecegoods from U.K.

(In thousand sq. yards)

	1950	*1951*
S. Africa	82,324	114,774
S. Rhodesia ..	17,025	21,124
India	5,947	7,010
Malaya	36,554	48,417
Sudan	6,842	9,876
Denmark	18,875	22,687
Turkey	4,107	7,941
Indonesia	3,356	7,037
French West Africa ..	3,177	7,050
U.S.A.	10,641	11,216

The markets which reduced their purchases from the U.K. were the following :—

Exports in thousand sq. yards.

	1950	1951
Br. W. Africa ..	138,772	129,159
Pakistan	67,099	39,393
Ceylon	11,933	10,776
New Zealand ..	48,488	45,442
Canada	22,144	14,219
Ireland	25,329	19,949
Sweden	18,717	15,668
Netherlands ..	9,202	4,673

	1950	1951
Jordon	6,178	3,693
Israel	921	338
Burma	18,232	10,252
Argentine	3,629	785

It should be noted that some of the above declines in off-take are due to the erection of mills in the territories concerned.

Total exports of textile machinery from U.K. rose from £40,435,086 in 1950 to £43,641,276. Increased purchases were effected by Pakistan, France, Italy, Turkey, Brazil and U.S.A. and spinning equipment accounted for more than half the total.

Imports of grey cotton cloths were 341,128,300 sq. yards (£32,187,132) in 1951 as compared with 245,425,300 sq. yards (£15,406,694) in 1950. India was the largest supplier followed by Japan (84,982,000) sq. yards, and Germany (32,706,000 sq. yards). In each of the two previous years, Japan was the chief supplier—177,651,000 sq. yards in 1949 and 90,967,000 sq. yards in 1950.

Financial position of U.K. Industry

Lancashire cotton mills made bigger profits in 1951 than ever before and the dividend paid out was the highest except for the 1920 boom. Average profits were £20,000 per company above the 1950 level, and more than double the gains in 1949. Dividends paid by nearly 100 firms rose by 3 per cent, the biggest jump since 1940.

A special analysis of trading results of cotton firms prepared by Mr. Frederick W. Tattersall, of Manchester, shows that the average profit of 80 spinning mills was £55,541 per company, compared with an average of £35,166 for 74 companies in 1950 and £26,313 for 73 concerns in 1949. The average dividend of 80 spinning mills last year (1951) was 21.26 per cent, against 18.21 per cent for 85 companies in 1950. Only in 1920 had this rate of dividend distribution been exceeded, when the mills paid out an average of 40 per cent. As in 1950, only one firm failed to make any distribution to shareholders in 1951.

The average dividend of 13 concerns which combine spinning and weaving was 22.29 per cent in 1951 against 18.95 per cent for the same companies in the previous year, making the average dividend of the whole of the 99 firms 21.40 per cent, compared with 18.06 per cent in 1950. Out of 99 companies, all but one have credit balance amounting to £8,165,027, an average of £82,475. In 1950, 102 firms had credit balances totalling £6,794,161, an average of £66,378. The single debit balance shown by one company amounts to £7,026.

In addition, the 11 leading cotton, spinning and weaving combines and their subsidiaries also produced record earnings totalling £8,376,789 in 1951 compared with £5,282,421 in 1950. The average profit made by these firms, which control more than 200 mills, was

£761,526 against £480,220, while average dividends rose from 16.33 per cent to 19 per cent. Total credit balances of the combines are now £4,367,351. Fourteen spinning mill companies made share bonus issues amounting to £687,291 last year, while four spinning and weaving concerns distributed bonus shares totalling £573,631. Three weaving firms made bonus issues of £130,000. Capital repayment was made by one spinning mill, totalling £35,976, and one firm of spinners made a bonus call absorbing £39,296. For the first time in the history of the U.K. cotton trade, the industry's 320,000 workers received a special Christmas bonus from all employers. The pay-out involved more than £3,000,000. In addition, wage rates were raised by 5 per cent from September. Average earnings in April 1952, according to the Ministry of Labour, were at an all time peak of £5 18*s.* weekly.

The Recession

According to Mr. Earnest Thornton, Secretary of the United Textile Factories' Workers' Association, about 180,000 workers were thrown out of work owing to the recent closing down of Lancashire cotton mills (in March 1, 1952). This number was more than half the total employed in the industry in Britain. Mr. Thornton estimated that more than £1 million had been lost in wages during that week. Mills in Lancashire announced "Holiday" shut-downs during Easter week. At least, 40 mills in Bolton and 35 at Rochdale were closed. The British Government was indeed very much worried by the closure or part closure of more than 350 mills. Their fear was that the recession would spread to other industries. According to, Sir Raymond Streat, Chairman of the British Cotton Board, help from the Government was necessary in fighting the cotton slump. He discussed with the President of the Board of Trade the whole range of problems. A deputation waited on the Chancellor of the Exchequer and appealed to him to take the purchase tax off all textiles for a period. In Parliament, Labour Members and several Conservatives joined together in asking for relief for the industry from the purchase tax which brings the Government 100 million sterling in revenue. Mr. Butler rejected the demands on the ground that the purchase tax was not the main cause of reduced buying. He announced, however, that the Government would place additional defence orders of between 20 and 25 million pounds, to help the textile industry. It would therefore be clear that the depression has affected the U.K. very seriously, while countries with large internal market like India are considerably better off.

The Japanese Cotton Industry

The extent of the Japanese cotton industry's recovery since the outbreak of the Korean war and the removal of the ban on additions to spindleage is seen in a statistical report published in Osaka by the Japanese Cotton Spinners' Association recently. According to this, Japanese mills produced 710,638,000 lb. of cotton yarn in 1951 compared with 525,417,000 lb. in 1950. In December 1951, the Japanese industry's output was 68,888,098 lb. a new post-war peak, against 65,549,246 lb. in

November which in itself was a post-war record. The improved power supply situation and an increase in production facilities were mainly responsible for the continued high production in December, achieved in face of a strike of cotton millworkers. The Association estimates installed spindleage at the end of 1951 as 6,484,094 of which 6,366,501 were operable. The average monthly operable spindleage was 5,207,970, representing an increase of 2,091,364 over 1950.

The continuance of Japan's high rate of cotton yarn production was dependent on man-power and continuous raw material supplies. The Tokyo Government was reported to have decided to cut its imports of U.S. cotton for the first quarter of 1952 by 51,000 bales. Nevertheless, the cry in all markets of the world was only about excessive stocks of Japanese textiles. Naturally, when the world recession in textiles started, Japan was hit the hardest. It may be noted that she had practically captured the Pakistan market as well as all other Middle East and Far Eastern markets. In Malaya for instance, Japan's export increased from 33 million sq. yards in 1950 to 47 million sq. yards in 1951. Similarly, in Siam, Japan increased her trade in cotton and rayon piecegoods in the first half year of 1951 to 28 million sq. yards. In short, Japan's exports of cotton piecegoods in 1951 were reported to have been over 1,000 million sq. yards out of a total production of about 2,280 million sq. yards! Japan had planned to raise the export total to 1,410 million sq. yards in 1952. But then, the Japanese industry did not bargain for the slump, that has now spread its tentacles over the whole world. Actually, the very readiness and eagerness of Japan to expand rapidly has made her feel the impact of the slump more acutely. As on April 1952, unsold stocks were reported to be 5 lakhs bales and the slump in the cotton market in Tokyo brought the prices down to 85,000 yen per bale, at which level the bare cost of U.S. cotton was covered. A curtailment of spinning operations was also foreshadowed. A 40 per cent cut in the textile industry, as a result of huge stockpiles dumped on the home market and thousands of workers being discharged was not considered too large to meet the situation.

The Japanese Cotton Spinners' Association appealed to the Government to help the industry in the slump and asked for its approval to reduce yarn production from 150,000 bales a month to 120,000 bales. The Association also approached the Government to persuade the Bank of Japan to advance loans against cotton goods. The Government could not provide the 16 billion yen which the spinning industry was demanding. The Governor of the Bank of Japan, Mr. Ichimada, stated that Japanese stockpiles should not increase further. As a result of the closing down of many mills and the revival of internal demand, things seem to have improved slightly by the end of April 1952. A further curtailment of cotton spinning operations which was considered necessary earlier in the month was not enforced as the price of yarn steadied up. Mr. Seiho Kakitsubo, Chief of the Cotton Industry Section of the Japanese Ministry of International Trade & Industry, has stated that Japan's cotton stockpiles including yarn and cloth have

recently been increasing at the rate of 10 to 20,000 bales per month. The stockpiles amount to more than 400 thousand bales, but in normal circumstances this is not considered to be a cause for concern. The Government is therefore trying to stablise prices. Out of 150,000 workers employed in the spinning sections, 23,000 are now working on short time and 10,000 have been offered retirement bonuses. The influential "*Oriental Economist*" gives three methods of assisting the industry:—

1. Freezing surplus stocks for the Government to buy up.
2. This they could do by creating a special Corporation, and holding cotton goods in bond.
3. Cotton manufacturers to pool stocks to form a collateral for a loan from the Bank of Japan.

What the industry needs is prompt action and the last remedy is considered to be the simplest and most expeditious.

We have devoted special attention to the Japanese Textile Industry because that is the biggest competitor of India. In every country in the world, the abnormal buying orgy of 1951 has resulted in huge stocks and as the following further reports from various countries show, it is going to be no easy matter for export trade to recover.

Italian Textile Industry

Italy's industry rapidly recovered from war time depression and there is a plan in hand for expanding production to about 1/3rd of pre-war levels. Textiles are a vital export industry for Italy which aims at expanding cotton textile production to 151 per cent of 1938. The leading employer of man-power in the country, the Italian textile industry has a vast range products from fine dress and furnishings to cheap cottons made for the Middle East markets. It employs 620,000 workers of which 450,000 are women. Towards the end of the last war, the industry was at a standstill. In 1938 exports of textile products were 3.2 milliard lire, out of the total exports of 10.5 milliard lire. By 1950 the ratio had come to about 33 per cent. The index of production (base 1938 = 100) was 99 in 1949 and 123 in 1950. A feature of Anglo-Italian trade in 1950 was expansion of Italian exports. Early in 1951, installed capacity was estimated at 5,500,000 spinning spindles, 1,200,000 doubling spindles and 140,000 looms. Annual consumption of raw cotton imported mainly from U.S. and Egypt average 150,000 metric tons. The home industry provides practically all the domestic requirements in cotton manufactures. Large shipments of yarns, piecegoods are sent to France, U.K., Egypt, Argentina and Pakistan.

It was recently reported that Soviet Russia has placed big orders for textiles in Italy.

In Belgium, the textile industry is facing a difficult situation. Over 35,000 workers are reported to be unemployed and exports of textile goods have shrunk to 18 per cent of total exports as compared with the monthly average of 27 per cent.

In its report for 1951 The Economic Commission for Europe has stated that the textile industries of the smaller West European countries have over-expanded. It says that since the huge post-war demand for textiles has been satisfied, it was unlikely that these countries would be able to develop textile exports on a large scale and that therefore there was a danger of a revival of textile productionism in the smaller countries, which would only make the great European textile producers still more dependent on exports to overseas areas.

In fact, the balance of payments position in each country as well as the necessity to shelter the home industry has already led to restrictions in imports of textile piecegoods in Australia, S. Africa, Java, New Zealand, etc. In New Zealand, under the licensing schedule for 1952, licences will be granted for the import of textile piecegoods from Japan to the extent of 50 per cent of the 1951 licences.

It is in this setting that Israel proposes to establish a few mills for cotton spinning of medium counts, weaving mills for heavy fabrics and integrated cotton mills for fine yarns. The enterprises are expected to involve a total investment of 40 million dollars. The saving in foreign currency is expected to be 15 million dollars per year, while the labour employed will also increase. Already Israel's exports have increased from £50,000 in 1949 to £1 million in the first half of 1951.

Eastern Markets

The Burma market is reported to be over-stocked with textiles and the Burmese Government had agreed to buy textiles from firms unable to take delivery of their imports owing to lack of finance. According to the Prime Minister it would be a good plan to buy cloth in bulk after calling for tenders so as to make it available to cultivators by way of agricultural loans. This attempt would help both importers and cultivators.

Ceylon is another country which has ideas of becoming self-sufficient in textiles. In January 1952, the Government of Ceylon had called for tenders for a new vertical mill in connection with their development scheme. The plant will include spinning, weaving and finishing to produce long cloth, sarees, shirting, etc. and to provide yarn for the handloom industry. There is already a statute for protection of new concerns and it even appears that there is provision for compelling local dealers to buy from indigenous production before purchases from outside. Under the trade agreement ratified in February last between India and Ceylon, the island will receive 45 million yards of cotton piecegoods this year, besides, 3,250 bales of cotton yarns for Ceylon's handlooms.

Pakistan

The following statement will show the position of the Pakistan Mill Industry.

PAKISTAN	Year ending 31st August 1950	1951
Total No. of Mills ..	14	27
Paid-up capital ..	10,723,779	30,662,870
Spindles installed ..	170,327	336,810
Spindles working ..	149,129	176,507
Looms installed ..	4,601	5,562
Looms working ..	3,978	4,641
App. quantity of cotton consumed in candies of 784 lbs. ..	38,736	43,568
No. of hands employed (Day shift) . ..	10,974	11,538

(*Source* :—Bombay Millowners' Association.)

The above figures show the rapid expansion of the Pakistan textile industry. Before partition, about 1,000 million yards of Indian mill production were consumed in the territories now forming Pakistan. Contrast that with the export quota for Pakistan fixed recently at 31.4 million yards of coarse cloth, 14.6 million yards of medium and 11.5 million yards of fine cloth. Similarly, U.K.'s export of cotton piecegoods to Pakistan which had remained stable during 1949-50 was cut by nearly half in 1951. The increase in import duties was one reason. But it must also be recognised that Pakistan has become a very good market for Japanese textiles, particularly in printed goods largely produced in non-fast colours. Our readers will be surprised to hear that Pakistan's orders are placed as far afield as Hungary, Poland and Russia, the price factor being of more attraction than quality. Presumably, Pakistan had a political edge in trying to get textile imports from the Cominform countries. Pakistan intends to become selfsufficient in cloth by 1954.

The British industry has helped Pakistan with advice and its supplies' to Pakistan have increased from 20 million sq. yards in 1948 to 61 million sq. yards in 1949 and 67 million sq. yards in 1950. A system of licencing control on higher priced fabrics imported into Pakistan reached adversely on exports from India, U.K. etc., while it proved favourable to the standardized poor quality goods from Japan. If Pakistan reaches selfsufficiency by 1954, the intervening period should be utilised for careful study of the lines that will be in demand in the future. It may be expected that, in the beginning, cheaper cloth will be manufactured and therefore attention of countries like India and U.K. will have to turn on producing specialised fabrics for export to Pakistan.

This rambling survey of the conditions obtaining in the world textile manufacturing or importing countries will, it is hoped, afford some idea of the rapid shirking of world export possibilities. Much depends on whether the world as a whole enters a economic depression or whether world trade revives after the present fall in prices. According to some critics, an enormous growth of world trade in manufactures over the next ten years will occur. This is ascribed to the large purchases of

primary products at higher prices by industrial nations. The primary producing countries will, therefore, it is said, earn large sums of money which they will spend on manufactures. This is possibly a viewpoint which will not be shared widely. At the same time, one cannot dismiss the import of the recent Economic Conference at Moscow which met on 3rd April 1952. One result of that meeting is that Russia is prepared to place large orders for textiles, leather goods, etc. with U.K. and other countries. If the Soviets are really sincere, on their initiative alone the world fall in trade could be stepped up by millions and Russian purchases would provide the best corrective to a depression if at all it is in the offing. British textile exports to Russia and her satellites have already started flowing; and if these are any indications, world trade in textiles may yet recover.

CHAPTER V

TEXTILE PRICES

In the previous Chapters, we have traced in considerable detail the factors that led to the severe slump in the textile trade. We have seen how all over the world textile industries are suffering from overproduction and how the manufacturing industry has been trying to curtail operations in an effort to cope with the prices. The first need of the situation is to effect rapid disposal of existing stocks, so that unemployment may be avoided. In this difficulty, the fall in prices offers no easy solution. Everywhere, the internal market has slackened while export demand is very dull. The sudden and large fall in raw cotton prices removed, so to speak, the bottom from the cloth market which has therefore been obliged to stand in mid air. Of necessity, therefore, a readjustment of cloth prices is felt to be necessary by the consumer public which cannot be expected to understand that the existing stocks were made out of cotton purchased at high levels, that manufacturing charges were increasing all along and that therefore immediate relief in prices cannot occur unless the trade is prepared to dispose of stocks at cost price or even at a loss.

In the case of our country, the problems have assumed the proportions of a crisis owing to various reasons; and they do not admit of an easy solution. In March and April 1952, wholesale cloth markets witnessed a staggering slump in prices. Prices of medium varieties fell by about 15 to 20 per cent, whereas the drop in prices of fine and superfine varieties was anything upto 40 per cent. This decline must be viewed against the fall in commodity prices generally which was of the order of 30 per cent. The fall in prices of cloth and yarn, gaining its momentum from the decline in commodity prices, came to co-exist with a situation of thousands of bales lying unmoved with the mills.* The

* Shri T. T. Krishnamachari, the enterprising new Union Minister for Commerce and Industry, outlined in Parliament on 19th May 1952, a seven-point plan of Government to meet the situation caused by accumulation of stocks, etc. immediately after he assumed office on 13th May 1952.

premium sales in a number of medium and fine varieties suddenly disappeared following the sudden and sharp contraction of demand all over the country. The retail trade kept away from the mills and wholesale markets in the hope that prices would be considerably reduced for the next quarter in view of the heavy fall in cotton prices. In fact, there seemed no limit to the expectation of the consumer, as to the extent of the fall in prices. The wholesalers already embarrassed by financial difficulties found that it would be impossible to dispose of stocks unless they sacrificed not only the unofficial premium they were enjoying all along but their profits as well. In the depressed conditions, the only demand was for coarse and grey cloth for which an assured market lay with cloth processors. The whole trouble lay with the fine and superfine varieties which nobody would touch at the stamped prices or even considerably below them. The contraction in offtake in these varieties was formidable. The nervousness in the cloth trade would have been accentuated much more if the mills, realising the precarious position of the market, had not refrained from pressing their sales. Obviously, they had nothing to gain from such a policy but the difficulty lay in the fact that financing of stocks in the dear money conditions was very difficult. Generally, the following declines were noticed in the various varieties :—Shirtings, at 25 per cent off ex-mill prices, superfine dhoties 40 per cent off, mulmul 15 per cent lower, white voile 10 per cent lower and coloured voiles at 25 per cent below ex-mill prices. Medium and coarse varieties were comparatively less affected.

Excise Duty

Generally speaking, the decline in market prices was to the extent of the excise duty, though it was even more in some varieties. Both consumers and the trade were therefore confirmed in their view that in the present conditions, the excise duty was a great hindrance. It was a hindrance to the mills and the wholesale trade who felt that, but for the excise duty, they might be able to liquidate stocks without undue loss to themselves ; on the other hand, the consumer felt that here was an obnoxious imposition by the Finance Minister, who expected an yield of Rs. 17 crores from cloth excise duties. Everybody felt that, when the average consumers' domestic budget had a chance of coming down, the Government were standing in the way. It may be noted that the excise duty on medium and coarse cloth amounts to 0-0-3 per yard, and on fine goods 5 per cent, on superfine goods 20 per cent. (From February 1950 the duty on superfine cloth was reduced from 25 to 20 per cent and on fine cloth 6¼ to 5 per cent, and on coarse and medium from 0-0-9 to 0-0-3 per yard.) Towards the middle of February 1952, the Committee of the Bombay Millowners' Association addressed a representation to the Government of India drawing attention to the difficulties experienced by mills in the disposal of superfine goods following the high incidence of excise duty thereon. The Committee stated that the demand for superfine cloth had become slack due to ex-mill prices approximately 50% higher than when the duty was first imposed in January 1949, due,

among others, to abnormal increases in cotton prices. The price increase had become still higher in retail sales and by way of illustration, the Committee invited Government's attention to the following table setting out the position of ex-mill and retail prices of P.B. Voile of Messrs. Shree Ram Mills Ltd., Bombay, 47″ width and 30 yards piece during January 1949 and 1952 respectively.

January 1949	Rs. a. p.	*January 1952*	Rs. a. p.
1. Ex-mill price per piece ..	25-0-0	Ex-mill price per piece	37- 3-0
2. Excise duty at 25% *ad valorem*	6-4-0	Excise duty at 20% *ad valorem* ..	7- 7-0
3. Retail price (calculated at 20% over the ex-mill price then allowed under the Control Order including excise duty) ..	36-4-0	Retail price (calculated at 14% over the ex-mill price now allowed including excise duty)	49-13-0
4. Sales Tax at 6 pies per rupee on retail price of Rs. 36-4-0	1-2-0	Sales tax at 6 pies per rupee on retail price of Rs. 49-13-4 ..	1- 9-0
5. Retail price inclusive of excise duty and sales tax ..	37-6-0	Retail price inclusive of excise duty and sales tax ..	51- 6-4

The Committee pointed out that, even with the reduction of excise duty from 25 to 20 per cent *ad valorem* and also reduction of retail margin from 20 to 14 per cent, the retail price of the particular piece of cloth under reference in January 1952, was in the neighbourhood of Rs. 51-6-0 as against Rs. 37-6-0 in January 1949 which meant an increase of Rs. 14 per piece, and submitted that such an enormous increase in price would militate against quick clearance of cloth. Export demand for superfine cloth had also become dull, firstly, on account of high prices and secondly, by the withdrawal of rebate of duty on imported cotton since June 1951 which had considerably affected the competitive ability of the Indian cotton textiles in overseas markets. In view of the dull export market, the Committee pointed out that mills were being compelled to dispose of the bulk of their production in the home market which, in their opinion, would be extremely difficult due to heavy excise duty. The Committee, therefore, strongly urged for an immediate substantial reduction of excise duty on superfine cloth to assist the industry to dispose of this high priced cloth.

The general financial situation in the country is not such as to warrant any optimism and it is unlikely that the Finance Minister would oblige the industry by reducing the duty. However, it may be pointed out that in actual practice, fine and superfine cloth are today being sold

at prices which excludes the excise duty. Hence, if excise duty is not removed it only means that the duty is paid not by the consumer but by the trade. There is no doubt that, budgetary considerations apart, there is a very good case for appreciable reduction of excise duties. After all, the Government must realise that the present high prices (stamped) of fine and superfine cloth were due to the fact that they were made out of foreign cotton purchased at high prices. In the present state of the export markets and internal markets, it is idle to expect such high priced goods to move. It must be remembered that about 35 per cent of the total production belongs to the fine and superfine varieties. These will be the hardest to dispose of. The trader would much rather confine his operations to medium and coarse varieties which still command a market. Domestic consumers cannot pay the level of prices which existed in 1951, and if the cottons already imported at high prices are to be utilised in manufacture at as cheap rates as possible, the only remedy is to remove the artificial control put by the Government both on prices and production. The utmost freedom should be given to the mills to manufacture such cloth as the mills and the trade consider most saleable under present conditions. Mere relaxation of 50 per cent control will be only a palliative.

Specific Excise Duty on cloth introduced in May 1952

On 8th May 1952 the Government of India announced specific excise duties for fine and superfine cloth, as alternatives to the *ad valorem* duties at present being assessed at 5 per cent and 20 per cent respectively. With the recent decline in cloth prices, the procedure of stamping on cloth excise duty on the ceiling price fixed by the Textile Commissioner caused inconvenience to the mills, as actual sale prices have often been less than the ex-mill ceiling prices. Under the new change, the mills will be entitled to claim assessment at the *ad valorem* rate, or the specific rate, whichever is less. On fine cloth, the specific rate of duty ranges from seven pies to one anna a yard and, on superfine cloth, from three annas to three and a half annas a yard. This will mean some reduction.

The mills will no longer be required under the Central Excise Rules, 1944, to stamp the contract price upon the cloth if such price is less than the Textile Commissioner's ex-mill ceiling price.

Increase of Prices urged in February 1952

In July 1951, the Bombay Millowners' Association had submitted a memorandum to the Chairman of the Cotton Textile and Cotton Control Committee asking for restoration of the 4 per cent cut in respect of coarse and medium goods in dyed and printed varieties and also fine and superfine cloth. The cut was not restored. Towards the end of January 1952, this matter was again discussed with the Secretary to the Ministry of Commerce and Industry. On the 26th February 1952, a conference of representatives of mills was convened in Bombay to consider the question of prices for cloth and yarn and the following resolutions were passed :—

1. This meeting of representatives of the Indian Cotton Mill Industry assembled in Bombay on 26th February, 1952, records as its unanimous opinion that though manufacturing charges, wages, power and fuel charges, stores and overhead charges, etc., have increased since April 1948 and exceeded the limits of variations indicated on page 39 of the Tariff Board Report (1948), no corresponding adjustment in cloth and yarn prices has yet been made. The meeting also calls attention to the fact that legislative and/or executive effect recently given by Government to social legislations such as provident fund for industrial Workers and Employees' State Insurance; Government's withdrawal of the food subsidy; and the proposed increase in railway freight on coal; all seek to impose further burdens on the industry, and therefore, requests the Textile Commissioner to enquire into this matter and adjust prices of cloth and yarn as per Government of India Resolution No. 10-T(i)48 dated 14th December 1948, after taking all relevant considerations into account, to set matters right from at least the commencement of the next price quarter, namely, 1st April 1952.

Prices of cloth and yarn manufactured from Egyptian cotton

Readers are aware of the Government's resolution on the recommendations of the Tariff Board regarding fixation of prices of cloth and yarn. Government had accepted the view that the replacement cost of cotton should be taken at the average of the prices prevailing during the first week of the month preceding the quarterly revision of prices of cloth and yarn. Towards the beginning of December 1951, Government issued the following press note in connection with the Egyptian cotton prices for the purpose of fixing prices of cloth and yarn manufactured out of that cotton for the quarter commencing from January 1952:—

"Owing to unusual, unstable and highly artificial conditions in the Egyptian market, Egyptian cotton prices have been unjustifiably rising. For this reason it has been decided that the usual practice of adopting the Egyptian cotton prices, prevailing in the first week of the month prior to the quarter in which cotton textile prices are fixed, will not be adopted for the coming quarter."

Immediately thereafter, a conference of industry's representatives was convened by the Textile Commissioner at which the industry was reported to have urged adherence to the usual procedure, failing which Government were requested to select some other period in December for the purpose, and to announce that period in advance so as to enable mills to arrange their cotton purchases. Subsequently, Government decided to take the average of the Egyptian cotton prices prevailing in the second week, i.e. from 10th to 18th December 1951 both dates inclusive, and an announcement to that effect came on 22nd December 1951, with the result that mills were unable to make purchases of Egyptian cotton at prices ruling in that period due to subsequent rise in the prices in the Egyptian market.

Early in January 1952, the Committee of the Bombay Millowners' Association addressed a telegram to the Government of India registering their protest against Government's departure from the usual practice of fixing price of cloth, as outlined above.

Revision of Prices

In March 1952, Government had announced that the quarterly revision of cotton prices for medium and coarse varieties which should have taken place then would be postponed until May 1952. Accordingly, towards the end of April, consultations were held at Bombay between representatives of the Government of India and the Textile industry on the question. On the 29th April 1952, the Government of India announced reductions in the case of various categories of medium cloth ranging from 5 to 8 per cent and in the coarse cloth from 16 to 24 per cent, on the basis of the formula of the Tariff Board. The cotton textile industry made no secret of its views about the downward revision of cloth prices. In the normal course, the rates of coarse and medium varieties should be pruned from May in line with the fall in the rates of Indian cotton. The mills, however, had represented to Delhi that much of the domestic cotton stocks used by mills at present had been bought at comparatively higher rates and that therefore if the prices were reduced from May they would be put to heavy loss. The industry's representatives seem to have stated that the Government might abide by the Tariff Board formula but that they should also make due allowance for higher manufacturing costs including labour, stores, and fuel.

In a statement on the Government of India's decision to reduce cloth prices as stated above for the month of May, pending an enquiry into the cost structure, the Committee of the Bombay Millowners' Association drew attention to the fact that Government had failed to take into account the increases in manufacturing charges that have taken place since 1948. The Association pointed out that though Government were technically correct in calculating cloth and yarn prices on the basis of cotton prices ruling in the first ten days of the month preceding the pricing quarter, it was not fair to do so for the reason that more than 85 per cent of the cotton allotted had already been lifted by the mills under pressure from Government at the ceiling prices fixed by Government. Government refused to accept the above suggestions. The industry further suggested that the whole question of the price structure be referred to the Tariff Commission, and that it should be given an opportunity of leading evidence. This too was not acceptable to the Government who decided that, for the present, a departmental enquiry into the cost of production of coarse and medium cloth would be enough. Even at the Annual Meeting of the Bombay Millowners' Association, Shri Somani had urged that a "pre-requisite of continuance of control would be a realistic scheme of pricing which would take into account all the outgoings of the industry and provide for a return on capital, which would in addition to yielding a fair rate of dividend, include a reasonable appropriation for the rehabilitation of the industry". While referring to the fact that the mill profits for 1951 were higher than those for 1950, Shri Somani pointed out that such profits were mostly derived

from exports, advantageous covering of cotton, etc. If it were possible to isolate the effects of such and other similar factors from the profit figures, the balance would not be sufficient, he said, even to fetch the 20 annas return per loom shift which was allowed to the industry by the Tariff Board.

Referring to the higher prices of cotton used up during 1952-53, he said that unless the Government guaranteed or the industry was sure that the level of cloth prices whenever such cottons were issued could bear the prices the industry had actually paid, the sooner the mills used up all the foreign cotton they had the better.

That would, however, imply, apart from the difficulty and loss involved in the sale of superfine cloth, that mills would postpone taking delivery of Indian cotton which would result in pushing cotton prices down. Shri Somani also pointed out that uncertainty as regards the future level of cloth prices and the absence of satisfactory hedging arrangements raised the question of writing down the value of the mills' holdings before they arrived at the trading results of the year 1952-53, which would absorb a fair slice of the reserves built up by a number of mills.

Shri Vithal N. Chandavarkar, Vice-President, Millowners' Association, Bombay, referred to the two imposts by the Government on the industry in the form of "Employees' State Insurance" and the "compulsory provident fund scheme", to both of which detailed reference is made in a subsequent chapter. The position as regards higher manufacturing costs requires to be examined carefully and at an early date. For, costs in the cotton textile industry are provisionally estimated to have gone up by 42 per cent since they were originally fixed by the Tariff Board for periodical revision of cloth prices. The bulk of the increase is attributable to higher outlay on labour, fuel and stores. This implies that if the Textile Commissioner's decision after the costs enquiry, meets the industry's claim, the cut in the rates of coarse and medium varieties will be entirely neutralised from June. In fact, there might even have to be a small increase! According to the Millowners' Association, Bombay, the manufacturing costs which were initially fixed by the Tariff Board at 76 annas for loom shift have increased to nearly 110 annas. Costs have been inflated by the levies, like those under the State insurance, and compulsory provident fund schemes. How the Textile Commissioner will allow for these increases in manufacturing costs, if he will allow them at all, remains to be seen. It is a really ticklish question because the justice of the demand cannot be gainsaid, and the States Governments have themselves been responsible, with their plans for a welfare state, for higher costs. At the same time, when the public outcry is for lower cloth prices on the basis of cheaper cotton, the Central Government's position will not be enviable, if it is going to turn its face from reducing cloth prices if and when the higher manufacturing costs are proved beyond doubt. This is the difficulty which Government encounter if they base their method of approach on the Tariff Board's formula; if according to that formula, lower cotton prices have to be taken into account, equally is it incumbent on Government to take into account the higher manufacturing charges.

To our mind, it seems desirable that the matter may be referred again for a full-dress enquiry by the Tariff Commission specially as some degree of stability seems to have been reached in cotton and cloth prices. Until such time as the Commission reports, the Government can adjust prices at small intervals after a brief examination of the costs. We say this particularly because it is fairly certain that any *ad hoc* price decisions made by the Textile Commissioner will not be acceptable to the mills, nor for that matter to the consumer public. In the absence of a statutory enquiry, official decisions will only encounter disapproval from all sides. And the solution of the problem will be as distant as before.

The reduction in prices of coarse and medium varieties which has been announced for the month of May has already led to coarse cloth being quoted for the export market at a premium of 5 to 10 per cent above the ex-mill price; if export enquiries further broaden,* there might even be a pull on the coarse and medium sections. The quota is, however, limited and when it is finished, it is feared that drills and sheeting may be in short supply because of their unremunerative prices. The vicious circle of complaints from the public following therefrom and Government having to ask mills to reserve a certain number of looms for the production of particular types of cloth may again be seen. Be that as it may, the cut in coarse and medium cloth prices has virtually put an end to all speculation about the possibility of the export duty being taken off. With the sizeable reduction in rates and cheap cotton available at home, the Government of India is under no pressure to abolish the duty. Still, it must be stated that the competitive position of Indian textiles in export markets will become clear only after the Textile Commissioner has completed his enquiry and decides on the new prices to be enforced from June 1952.

Changes in Cloth Prices from 1-1-51

We give below a very interesting and informative table showing the average percentage rise or fall in cloth prices over previous period prices, from 1st January 1951 till 1st May 1952.

Varieties	Period 1.1.51 to 31.1.51	Period 1.2.51 to 31.3.51	Period 1.4.51 to 30.6.51	Period 1.7.51 to 30.9.51	Period 1.10.51 to 31.12.51	Period 1.1.52 to 31.3.52	Period 1.4.52 to 30.6.52
Coarse (Upto 17s) ...	11.9%	4.4%	3.8%	...	...	...	—20.34%
Medium (—) (17s to 36s) ...	—1.75%	6.9%	3.8%	...	...	...	—4.15%
Fine (36s to 48s) ...	16.4%	...	7.7%	—1.2%	—4.55%	2.8%	—6.55%
Superfine (48s & above) ...	8.5%	...	17.1%	—9.6%	—15.4%	23.15%	—8.7%

* On 17th May 1952, Government announced that licences will be freely granted for export of coarse and medium cloth to all destinations. A quota of 175 million yards was already fixed for January/June 1952, out of which only 40 million yards have been utilised so far.

From 1st May 1952 a reduction of 20.34 per cent was effected in case of coarse goods, and 4.15 per cent in case of medium. This was to be applicable for the month of May 1952 only, and in the interval, the Textile Commissioner was to enquire into the structure of prices.

CHAPTER VI

TEXTILE POLICY

Recent developments have focussed the attention on various problems of the cotton textile industry, particularly, the desirability or otherwise of maintaining an integrated system of controls. The slump in prices of cotton and of cloth and the existence of large stocks in the country have all prompted considerable speculation about decontrol. When the crisis started in March 1952 and deepened in April, the pressure on Government for decontrol has been strong. For years now, raw cotton interests have been pleading for removal of control on cotton. It is only the scarcity of Indian cotton, so necessary for the production of coarse and medium cloth, that has made the authorities continue cotton control. One could never anticipate what price ramps might not be engineered by the creation of abnormal conditions of scarcity. Any upward movement in cotton prices would of necessity compel an upward revision of cotton prices in accordance with the formula of the Tariff Board. Similarly, the continuance of control on the manufacturing side had its justification in this same factor, namely, that if the mills were allowed to manufacture cloth and yarn as they pleased, it was just possible that utility cloths' production might be insufficient for the country's requirements and might give rise to distress among the middle and lower classes. In regard to the last stage of fixing cloth prices, whether in respect of the imported varieties of cotton or of the indigenous varieties, Government till very recently and, perhaps even now, could hardly depend on a policy of *laissez faire*, for fear of speculative increases in prices by the trade. The memory of the 1948 experience when cloth was decontrolled and prices shot up to absolutely unconscionable levels is still deeply imprinted on the minds of both Government and the consumer, so that a repetition of the episode, however unlikely, has to be provided for again.

Stage set for Decontrol?

Whatever the experiences of the past may have been, it is abundantly clear that the existence of control at the present time is leading to many a situation for which Government have to provide the remedies. It is also likely that Government will be blamed for everything that goes wrong in this large industry. Decontrol, with a few checks here and there, could probably please the industry and the consumer at the present stage and also relieve the Government of the enormous responsibility it has undertaken. There seems to be no other way of finding

a solution for the numerous problems which Government are asked to solve—provision of cotton at control prices, effecting optimum production of certain essential varieties, disposal of stocks, provision of finance for cotton and cloth stocks when they do not move along the usual channels and maintaining grip over cloth prices in the interest of the consumer. All these headaches could at one stroke be got rid of by the magic weapon of decontrol, because then the responsibility would be squarely upon the shoulders of the industry.

The question is: If the industry is decontrolled, what will be the unfavourable consequences to the consuming public? In considering this question, one or two factors should be borne in mind—the 1948 decontrol experiment failed largely because the stock position at that time was not really healthy and it was possible for unscrupulous traders to put the available stocks underground and create an artificial scarcity so as to cash in on the prevailing consumer demand. It is doubtful whether such conditions can be repeated today. For one thing, the stocks within the country are considerable and it would be no easy job to keep them underground. Moreover, there is such an abundance of cloth in other countries that, at a mere signal, if it were necessary, imports of cloth could be arranged and even at favourable price terms. Secondly, the consumer will no longer be the dupe he was in 1948 when the mere cry of scarcity made him rush madly to the markets and pay whatever prices were asked for. Throughout 1951, the consumer in India and all over the world, has been making steady purchases and his wardrobe is now fairly well stocked. There is not likely to be any rush for cloth in 1952 on account of this factor alone. Furthermore, the events of the last few weeks have clearly shown that consumer resistance can assert itself in no unmistakable manner. Even today, in the hope of a further fall in prices, consumer purchases are being deferred; if, therefore, in the event of decontrol, the cloth trader should again start playing any ugly tricks on the consumer, the latter can teach him a lesson in no time. There would simply be no purchases at all if equitable prices are not charged.

The position in regard to supply of raw materials has also improved considerably and the world today has abundant stocks of raw cotton. Even the production of Indian cotton is steadily improving. Provided cotton prices are maintained at reasonable stable levels and have a proper relation to food prices, even the cotton crop should improve in the coming years. In any case, imports of foreign cotton can always be arranged and as compared with the last two years such cotton could perhaps be had on very advantageous terms so that even decontrol of cotton can be brought within the bounds of feasibility.

It is the careful conclusion of many knowledgeable observers that the present is the most opportune moment for the decontrol of cloth; at any rate one cannot imagine a better set of conditions than now for embarking on such a bold decision. But undoubtedly, it will be a bold decision to take even in these conditions. If Government lack the

courage to embark on that decision, they should at least appoint at an early date a Committee to enquire into the working of textile controls and report on the advisability of continuing it.

Expansion of Industry

It will be remembered that the Committee appointed to prepare a plan for the development of the industry proposed in 1945, a plan for the expansion of output to the extent of 1,700 million yards of cloth per annum. The Government of India agreed with the recommendation and granted about 125 licences for importing necessary machinery and erecting the same. The scheme was thought of in order to provide a *per capita* quota of 18 yards per annum. Of course, many difficulties have come in the way of such expansion. Before the British quitted India, they were reluctant to grant licences for import of machinery other than from the U.K. Further, the supplying firms were so fully booked with orders that deliveries were a mere trickle and were effected much later than the date when they were expected. The establishment of a Corporation for the manufacture of textile machinery in India in co-operation with British business has not improved matters. Only about 5 composite mills and a few (30) spinning mills in South India completed erection. They have paid 5 times the pre-war cost for buying the machinery and have exhausted all their paid-up capital. Further issue of capital is absolutely out of the question these days. The shares already subscribed are quoted far below the paid-up value, and unless there is a reasonable chance of dividends being earned, it will be very difficult for obtaining fresh capital for these new mills. The new mills will not obviously be able to declare dividends for many years.

Problem of New Mills

The present price policy does not contain any deviations for new mills and what happens is that the price structure based on the working of old established mills is being applied to the new mills also. Perhaps, if there had been no price control and each mill stood on its respective efficiency, the new mills would have done better than the old mills. Since the present control rates are based on weight of yarn and cloth produced, the new mills do not get any premium for the *better* quality of cloth they undoubtedly produce. Under these circumstances, it is impossible to expect the new mills to make any profits. Either the control should be removed or a separate price structure, along with facilities and concessions, should be applicable to the new mills.

Shri K. N. Modi's Speech

In his address at the inaugural of the All-India New Textile Mills Association held at Delhi on 10th April 1951, Shri K. N. Modi, Managing Director of the Modi Spinning & Weaving Mills Ltd., Begamabad, Meerut, had some trenchant observations to make as regards the lot of the new mills. He said that these mills were passing through a critical

phase and only timely help could prevent their liquidation. He pointed out that a new textile mill cost 5 times more than during pre-war period. An old composite mill with 25,000 spindles and 600 looms cost Rs. 25 lakhs in those days, while a new mill cost Rs. 120 lakhs. The new mills were thus heavily over-capitalised and could not compete with the old ones at present. Shri Modi, therefore, asked for special facilities for them in respect of price fixation, distribution, cotton allocation and export.

Effect of present Price Fixation on New Mills

When the control was introduced, the Government of India based the prices on the report of the Indian Tariff Board on the cotton yarn and cloth prices submitted in 1948. But the Tariff Board while making recommendations did not take into account the high cost of a new plant and building under the impression that a new plant might not be imported for the next four to five years and ignored the prices for the new plants while fixing the present prices of yarn and cloth. For costing purposes, depreciation and interest on the capital were based on the cost of a plant of pre-war prices, and the Tariff Board too acknowledge this fact in their report and recognise that in estimating the block, the cost should have been on the replacement value or on the current prices. The Tariff Board recommended a return of 6 per cent on gross block of pre-war period for the purposes of estimating the fair ex-mill price and they recommended four per cent on gross block as a suitable provision for depreciation. Thus, taking 10 per cent on the extra investment employed on the current prices, a new textile mill has to pay 9 to 10 per cent more than a pre-war mill by way of interest and depreciation on the extra investment employed, although the present price structure is the same for the pre-war as well as post-war mills. In this way, the new mills are losing 9 to 10 per cent on the present ex-mill prices. Thus, the present price structure is affecting adversely the new textile mills, which are in a precarious condition. The existence of certain uneconomic, unbalanced and comparatively smaller units is also at stake under the present price schedule fixed up by the Government without taking into consideration the cost of production of such units. It is therefore necessary that either the present price structure be suitably revised or amended so far as it is applicable to new and uneconomic mills to cover their extra expense or they may be allowed a suitable margin above the ex-factory price from the intermediary margin within the ceilings of the retail prices of cloth and yarn.

Distribution

The old mills had a good amount of reserve and had incurred less capital expenditure when the control on the sale of cotton textiles came into force. They had, as a matter of fact, written off the cost of their plant and were in a much more advantageous position as compared with new factories. The new factories are already working on borrowed capital and it is not possible to raise further capital in view of the present decline in the money market. They have thus to run the factories within

their present financial limitations and are not in a position to hold on to the stock of cloth produced by them. The new and uneconomic mills should be allowed some special facilities to dispose of their production.

Export

The new textile mills are not yet fully established in the trade and have not established trade relations with the foreign countries for purposes of export of cloth and yarn. They are, therefore, under a handicap as compared with the old mills, in the export of cloth and yarn. Therefore sufficient quota for export should be allowed for new textile mills so that they may establish themselves in the foreign trade.

Cotton

The new textile mills have no carry-over stock of cotton and they have to build up adequate stock of cotton for three shifts to run their factories without any break for want of raw cotton. Suitable provision for the supply of cotton from specified areas should therefore be made for these new textile mills according to their full capacities, because the new and uneconomic units cannot survive unless they have sufficient cotton to run complete three shifts. In view of the difficulties of the new and uneconomic mills, the Government have extended from time to time certain special facilities to them, but their interests are not represented adequately in the various official and semi-official Committees with the result that their case often goes by default.

Shri K. N. Modi's observations deserve the most earnest consideration of Government. It may be that, for the time being, the new mills are in a minority, and their interests may not receive the consideration which ought to be extended to them. But there is no doubt that Government have to keep them alive somehow, if only because of efficiency considerations which should be placed in the forefront of Government's attention. After all, the machinery installed in most of our mills is old and often out of date and in a competitive world, they may not be able to play their part as effectively as new mills with streamlined technique. While the rest of the world is renovating its equipment in textile manufacture, India has lagged considerably behind, the reason being that there was no compulsive force. The haven of a large internal market, which has been more or less at the mercy of the Indian mills since 1943, has sheltered the indigenous industry from many a storm. It is doubtful whether the industry can go on banking on this support. The mills will be put on their mettle very soon, if one may judge from international trends of production. Moreover, the Welfare State which is being planned has for its cornerstone a policy of lowest production costs and since food prices are more or less out of bounds and beyond the control of the authorities, what is more natural than that Government should desire that the next necessity of life, viz., cloth, should be made available to the people at the lowest prices. A Gilbertian situation would arise if the cost of the chief raw material (cotton) in India as

well as the world goes down almost to depression levels and yet our mills charge the same high prices, because forsooth manufacturing charges are allegedly higher to a considerable extent. It is here that the question of efficiency arises, because if we have an up-to-date and modern equipment, not only would efficiency in output be stepped up, but even the quality of cloth turned out would be infinitely superior. Such high quality production will also incidentally enable exports to be maintained. While we are not suggesting by any means that the present machinery in all the mills should be scrapped and replaced by the most modern machinery—on the face of it, this is impossible, if only on account of financial considerations—we do suggest that, from now on, steady efforts should be directed by all the old mills at a programme of replacement. We advocate a five-year plan of renovation, in which Government should take the keenest interest in order to help the mills in every possible way, i.e., not only in obtaining deliveries of plant from abroad on schedule, but giving encouragement to such a programme of replacement by allowing extra depreciation for such mills in the matter of taxes. In due course then, old and new mills will come to stand more or less on the same or similar footing and there will be no question of a policy of discrimination between old and new, such as obtains at present.

Sir Sri Ram's Remarks

At the Delhi Cloth Mills' last Annual Meeting, Sir Sri Ram made one or two observations to which we should like to invite the attention of our readers.

Surplus of Dyeing, Bleaching Capacity

"There is another policy of the Government of India, which I cannot understand or appreciate. For so many years, there has been surplus capacity in dyeing, bleaching and printing. In spite of this surplus capacity, they allow new concerns to put up dyeing, bleaching, and printing plants which all means unnecessary capital expenditure in the country and outside the country. The highest percentage of production allowed to be bleached, dyed, etc., by any factory varies from 20 to 25 per cent. Is it fair that new plants should be allowed to be put up for this purpose, making the cost of overheads of every concern high? This is a very serious matter and the Government ought to change their policy in this regard.

Income-tax Concession to New Industries

As you know, the Government have given certain Income-tax concessions for a period of 5 years for new concerns and extensions to old ones. I think the Government would be well advised in extending these concessions for another 5 years, if not 10. It takes at least 3 years to make the preliminary arrangements and set up the required buildings and machinery before a factory can come into production, let alone, the earning of profits. To the extent that these concessions bring new

industries into existence, the Government would gain new sources of revenue in the long run. By these concessions for future factories, the Government would lose nothing in the earlier years for the simple reason that otherwise these industries may not be in existence. Incidentally, the setting up of new industries and the expansion of old ones would also remove unemployment."

In view of the immense experience and business acumen of Sir Sri Ram, it behoves the Government to pay heed to these counsels.

CHAPTER VII

RAW COTTON

In the earlier chapters, detailed reference has been made to the slump in the prices of commodities, particularly, in that of cotton, and it has been pointed out that the raw cotton market has been most severely hit during the present crisis. While cotton prices fell to levels very near to their floor prices in India, the fall in prices of foreign cottons was even more severe. Each was reacting upon the other to produce a state of suspended animation. The general financial stringency increased the financial difficulties of importing American and Egyptian cotton. It became necessary to extend the validity of import licences. While prices were falling, the policy adopted by the mills in refusing to lift cotton stocks against allocations aggravated matters and the complaint against the mills was that they were not playing the game. Early in March 1952, thousands of bales of various types of cotton had accumulated in almost all the production centres, with nobody to purchase them or transport them to the manufacturing centres.

As on 2nd March 1952, it appears that some 1,945,000 bales had arrived in the market in the form of kapas and lint, out of an estimated crop of 3,360,000 bales. Till the middle of February 1952, the Government had issued quotas estimated at 21.2 lakh bales. Of that, hardly 60 per cent had been lifted by the mills upto 1st of March 1952, while stocks of about 9 lakh bales were being held by intermediaries on behalf of mills. The apathy of the mills in lifting cotton seemed very strange, especially when there was such a scramble for supplies in the previous year. One explanation was that they were waiting for a crash in cotton prices to cover their requirements; another was that they had full inventories in view of large imports. Anyway, the authorities in the beginning pleaded helplessness and it was even suggested by some that the Cotton Control Order should be amended so as to make it incumbent on mills to lift stocks within a reasonable period after allocation of quotas. Some idea of the price decline may be had from the fact that kapas Jarilla was quoted at Rs. 265 per candy, and Bengals at Rs. 470. Export demand for Bengal Desi was entirely absent.

The complete cessation of demand led to a virtual closure of most up-country markets. From Madura, it was reported that more than 3,000 bales of Karunkanni and Kambodia cotton had accumulated and the cotton merchants appealed to the Textile Commissioner to provide relief. In Surat, about 70,000 bales of cotton were lying with growers and merchants and prices quoted at Navsari were Rs. 100 lower than the ceiling prices. A demand for compensation from the Government for the loss incurred by merchants as a result of Government's action in freezing cotton seeds stocks while prices were high and releasing stocks while prices went down in 1950-51 was also made. The East India Cotton Association also urged Government to compel the mills to buy, as in its opinion further delay would be detrimental to the cotton merchants. In Ahmedabad alone, merchants were carrying stocks worth about Rs. 1 crore while Rs. 25 lakhs worth of cotton were lying idle with farmers who had produced a normal year's crop by well-irrigation.

This state of affairs continued for 2 or 3 weeks and the major headache was the financial embarrassment caused by the heavy booking of American cotton imports. Cotton export business was practically nil meanwhile, and importers were reported to be trying to obtain informal cancellation of import contracts. Pressure was brought on the Government to permit such cancellation so as to save the industry and the suggestions ranged from permission for cancellation to reselling of American cotton, here and abroad. The quantity affected is some 1,57,000 bales, over 4,57,000 bales having already arrived by the middle of March 1952, and nearly 3 lakh bales being afloat. Rumours that Government may release Jarillas and Oomras for export were denied. The trade was definitely annoyed at the handling of issues, and Government was blamed for callous indifference. Some merchants felt that cotton should have resisted the slump as nowhere else in the sterling area cotton was available at 40 pence a pound, while in India Jarillas were available at 17 pence and Kambodias at 23½ pence.

Export Duty on Cotton Halved

Faced with this crisis in all commodity markets, the Government of India decided on March 15, 1952 that the export duty on raw cotton would be reduced from Rs. 400 to Rs. 200 per bale, and that on soft cotton waste from 50 per cent to 30 per cent *ad valorem*. The reduction was a belated attempt to boost the export trade but it was at considerable expense to the treasury because Government had estimated Rs. 5.5 crores revenue previous to the reduction in duty. We say belated, because if the Government had reduced the export duty on Bengal desi earlier when shippers brought the urgency of the situation to the notice of Government, the export trade could have secured not only better terms but a larger volume of business which would have benefited the country. American demand for Bengals was slow to revive and it was doubtful whether the quota of 1 lakh bales will be covered. Similarly, the U.K. was expected to take up 25 thousand bales but hardly any demand was forthcoming. It was only towards the end of

March that enquiry came from Germany, Italy, Belgium and Holland to take up Bengal quota.

The Cotton Advisory Board towards the end of March 1952, considered the issue of liquidating domestic stocks of cotton and recommended that till the existing allocations to the extent of 32.34 lakh bales were lifted, no special allocation of or change in zonal allocation should be given to the mills. This seemed a rather inane approach to the problem, and the fundamental issues involved in the refusal of mills to lift stocks were not properly understood. These were: the financial squeeze, the dwindling demand for cloth, the inelastic cost structure of the mill industry, and the narrowing of margin between prices and profits. At the end of March 1952, the cotton crop estimate was revised to 33.75 lakh bales of which arrivals in the form of lint and kapas were placed around 5 lakh bales.

Cotton Purchases at Floor Prices

In the first week of March 1952, in response to persistent demands from the cotton trade, the Government of India came forward with an assurance that if the price of any variety of cotton touched the floor price fixed under the Cotton Control Order, it would itself enter the market to buy such grades at the floor prices. Shri Chintaman Deshmukh in giving his assurance in Parliament recalled to the House the fact that Government had purchased cotton to support prices in 1943 and 1945. We would not admit that the slump in cotton prices was anything more than one occasioned by the refusal of mills to take their quota. He defended cotton control, which had been established so as to safeguard the grower and keep a check on cloth prices, while the ceiling had been raised from time to time to encourage cotton cultivation.

When the Cotton Advisory Board met in Bombay, the Textile Commissioner discussed the mechanism of purchase of Indian cotton by the Government in up-country centres as well as Bombay.

Financing American Cotton

Out of 9 lakh bales of American cotton contracted for supply to the Indian textile industry, 4 lakh bales had already arrived, 3 lakhs were in transit and the balance of 2 lakhs were yet to be bought towards the end of March 1952. Cotton interests had represented to the Commerce Ministry that they were finding it difficult to raise the necessary finance for the purchase of American cotton owing to the tightening of credit. The hard-pressed importers had already disposed of thousands of bales through distress sales before the Central Government's assurance of credit facilities came forward. On 28th March 1952, a statement issued by the Ministry of Commerce stated that the Government had decided to give an assurance to scheduled banks that American cotton pledged with them against loans granted to the mills would be bought by the Government at prices equal in rupees to the American floor price, should

the banks find it necessary to sell such cotton to realise the loan. The details of the scheme were worked out in consultation with the Reserve Bank. The floor price of American cotton was about Rs. 1,700 per Indian bale and it was estimated that a sum of Rs. 46 crores would be necessary to finance American cotton. The question also arose as to what should be done with regard to East African cotton, of which India imported 1,60,000 bales of the value of about Rs. 14.2 crores. Together, the cost of imports from these two sources at floor prices alone amounted to Rs. 60 crores. The Government assured the purchase of East African cotton at Rs. 1,770 per candy. As a result of the provision of these credit facilities, the cotton market became steadier.

By the middle of April 1952, it became clear that despite the Central Government's guarantee of minimum prices to banks, the situation had not changed very much. It was said that merely on the basis of an official guarantee to take up stocks, banks were unwilling to depart from the normal practice of financing. It was also said that while announcing the guarantee, Government had not stated anything about the practical problems of storage responsibility, incidental charges, etc. Thus it came about that importers were facing the onerous task of finding no less than Rs. 50,000 for every 100 bales of American cotton imported by them. Banks lend to the extent of 75 per cent of the market rate Rs. 1,650, Rs. 1,700 (California st. mdlg. 1⅛) which is actually the "distress rate", while the imported value was in the neighbourhood of Rs. 2,000. The floor price announced by the Government was Rs. 1,644 and it was expected that bank finance will be available at that rate in full. But as it is, importers had to find privately not only the balance of 25 per cent but also the difference of about Rs. 400 per candy on the basis of the actual invoice value. The Import Advisory Committee considered these issues, but as usual nothing positive came forth. Perhaps, if the Government categorically states that it will buy up the cotton at the rates announced, should any importer express a desire to tender it to the Government at the stipulated rate, banks may be inclined to liberalise their credit facilities.

Purchase Scheme

There is no doubt that a debacle in cotton was averted by the price support scheme formulated by the Government. They showed rare and commendable promptness in setting up the machinery for implementing the scheme. The fall in prices of Indian cotton was noticeable particularly in Westerns, Jarillas, Kumtas and Laxmi. Except for Kambodia and Karunkanni which were being gradually lifted, the total quantity of other varieties of Indian cotton in which offtake is poor was not expected to exceed 6 lakh bales. The better and sounder cotton of this quality was anticipated to be in demand since such varieties of the new crop could be had only after February 1953 and mills as such would like to replenish their current stocks as soon as possible.

The purchase scheme of Government envisaged the appointment of well established cotton firms as buying agents to effect purchases

of cotton tendered by all persons except manufacturers. A number of such firms have been offered contracts by the Government for appointment as official purchase agents and the terms and conditions of such appointment have been circularised. The proposed buying agents met in a conference at the Textile Commissioner's office and discussed the draft scheme and conditions of operations. Details available indicate that purchases will be effected by the agents on the Textile Commissioner's or the Cotton Director's instructions in consideration of a commission of ½ per cent of the contract price. Purchases will obviously be restricted to full pressed bales at basic minimum but not one inferior to staple or class for which "off" allowances are provided in the schedule. Samples are to be drawn by the agent and surveyed, except in case of stocks in jethas. In the latter case samples will be allowed only if the agent provides accommodation. Survey fees will be borne equally by the Government and the seller if the cotton is purchased by the Government. Two days before weighment, the agent is expected to submit a bill for 90 per cent of the contract price payable to the seller, excluding subsequent charges and expenses accompanied by relevant documents. The Government will arrange to reimburse the agent through the Bombay office of the Commerce and Industry Ministry. As for the balance of 10% and the ½ per cent commission, the payment will be made subsequently. Provision has also been made for rejection of bales if they do not conform to requirements. In case the value of such rejection is more than 10 per cent, the difference will have to be paid by the agent into the Reserve Bank. The Government will not be responsible for payments made to sub-agents.

The agreement is obviously restricted to the 1951-52 crop and it is believed to be of only three months duration. The scheme as such is not spectacular but what is important is the financial implication of its operation. The amount of money required will run into several crores looking to the large quantities of cotton heading for the floor. In Madhya Pradesh, for instance, it is believed that nearly three lakh bales of kapas are still to arrive into the market. There are in addition nearly two lakh bales concealed and likely to be unloaded in the market any time, now that the impetus to hoard has been effaced. So long as the market is closed, the present levels, low as they are, will be sustained.

Observers, however, feel that even if the initial cost of the price support scheme may be heavy, the Government will not be a loser in the bargain ultimately. The implementation of the scheme will provide a much desired prop in the markets and a recovery in prices can then be expected. Growers will also be assured of official assistance in distress conditions and deflections from cotton cultivation may be stemmed.

The prices in the country were generally 5 to 15 per cent above the floor and not many growers would approach these nominees. Moreover, the tendency to wait in the hope of better prices coming about exists and hardly 75,000 bales were expected to be offered to Government nominees. The latter were not very enthusiastic about the half

per cent commission with which they have to run establishments in up-country centres. Last year, when prices were near the ceiling, they were getting 1¼ per cent commission. Still, they have not turned down the plan completely and are prepared to give it a trial.

In the first week of May 1952, cotton prices moved up by about 5 per cent as a sequel to brisk buying by mills. They were prepared to pick up ready stocks of Indian cotton in large quantities to complete the process of the shift from superfine to fine cotton. The current level of mill consumption indicates the use of about 2.5 lakh bales of Indian cotton and about 90,000 bales of foreign cotton per month. While last year, the consumption of Egyptian cotton averaged about 30,000 bales a month, this season it has fallen to 14,000 bales. But the use of American cotton has doubled around 60,000 bales.

All-India Estimate of 1951-52 Crop

The All-India fourth estimate of the cotton crop issued by the Ministry of Agriculture on 27th April 1952, puts the current year's area and output at 15,125,000 acres and 3,041,000 bales for 1951-52 against 2,676,000 bales adjusted for the previous year. This shows an increase of 12.3 per cent in area and 13.6 per cent in production. Official estimates are generally lower than trade estimates which place the size of the 1951-52 cotton crop at about 34.2 to 36.2 lakh bales against about 31.8 to 33.3 lakh bales for the 1950-51 crop.

The total arrivals to date (April 1952) of cotton in kapas form are computed at 27,18,000 bales. Mills have so far purchased over 20 lakh bales. Quotas allotted to mills out of the 34.30 lakh bales crop total some 33 lakh bales. In order to stimulate mill purchases and to relieve the burden of stocks on the falling market, the Textile Commissioner had decided to grant allocations against applications irrespective of area and types sought.

The Government amended in April 1952, the Cotton Control Order to allow growers to bale kapas and hold or sell it without licence. This will enable large landholders and well placed cultivators to hold on to their stocks from a falling market.

Exports

After several months of stagnation and uncertainty, foreign buyers have re-entered the Indian market with bulk orders and it is believed that Indian shippers have succeeded in selling 10,000 bales of short-stapled varieties within ten days at fairly reasonable prices. The rates at which bargains have been struck are more or less about 23.50 pence a pound for Continental markets and Japan, and 27 cents for the American market. Between September 1, 1951, and April 21, 1952, India shipped 3,476 bales of cotton, the break-up being as follows: 1,115 bales for the Continent, 1,000 bales for Japan, 1,250 bales for the U.S. and 111 bales for other countries. During the corresponding period in the last season the total

quantity shipped was 76,505 bales. Much leeway will be made up now that keen export inquiries are pouring in from all quarters.

The policy of relaxing controls in the field of export should be continued. Restrictions were imposed at a time when conditions were different, but Government have revised their export policy to accord with the changing economic scene. Early in April 1952, it was reported that cotton consumption the world over had dropped considerably in the past 2 weeks. In U.K. the mill offtake had dropped from 42,000 bales a week to 32,000 bales. In U.S., over-all consumption had fallen by 20 per cent, in Canada by 10 per cent. Japan has curtailed yarn production by 40 per cent and in India, cotton consumption has fallen by about 15 per cent. It was therefore wise on the part of the Government of India to announce an additional* export quota of 52,000 bales of short staple cotton. The announcement actually came at a timely moment since earlier official disclaimers had suggested that more varieties and quantities of short staples would not be exported. The qualities now added to the export list included Kalagin, Dholleras, Mathias in which the prices have spurted up by about Rs. 75 per candy as a sequel to the export quota. In May 1952, Oomras and Zoda were also added.

Revision of Cotton Prices

A deputation of Madhya Pradesh cotton growers waited on the Finance Minister on 28th April 1952 urging a revision of cotton prices. Shri Deshmukh was reported to have acknowledged the possibility that cotton floor prices may have to be revised, if it was found that they were unremunerative, because of their having been fixed some years ago, when the production cost was much lower. When ceiling prices were revised twice during the last two years, floor prices also might have been suitably readjusted, but no action was taken as the need for it was not foreseen either by the grower, the trade, or Government. It would, however, be a wrong policy to revise floor prices in the middle of a season, the Finance Minister is reported to have said.

Government of India's Cotton Policy in 1950-51

The scheme of appointment of nominees for the purchase of cotton caused much resentment in the trading circles in Buldana, Akola and Amraoti districts of Madhya Pradesh and protests were made to Government against the nominee system and it seemed at one time that the entire trade in that region would come to a stand-still. To get over this impasse, the Textile Commissioner appointed further six nominees for the purchase of cotton in those districts of which three were drawn from the local cotton firms of the region. The nominees were also allowed to charge their commission and sales tax from mills to whom the cotton was sold. With regard to Cambodia cotton grown in the districts of Amraoti, Buldana, Akola, Wardha, Nagpur and Yeotmal,

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* The total quota released upto 17th May 1952 was 3,02,000 bales.

the Textile Commissioner sanctioned subject to certain conditions, the payment of a premium of Rs. 30 per candy over the statutory Jarilla prices and at the same time appointed nominees for the purchase of this cotton.

Towards the latter part of March, the nominee system was extended to other cotton areas, and the Textile Commissioner appointed nominees for Westerns, Karunganni, Cambodia, Rajapalayam, Dhollera, Coompta, Jayawant, Laxmi and Jayadhar cottons. In appointing nominees, the Textile Commissioner selected a majority of them from among firms which were established in the respective areas. Where, however, the local firms were considered inadequate another category of nominees designated as 'B' class nominees were appointed to act as a link between the mills and the nominees of the local areas. Regional Committees were also appointed in important regional centres to supervise the nominee scheme. Simultaneously with the appointment of nominees, Distribution Committees were also set up through which sales and purchase operations of nominees were controlled.

Distribution of Laxmi and Jayadhar Cottons

Of the total available supplies of cottons in 'D' zone, Jayawant, Upland and Westerns were estimated to constitute about 60 per cent, and the balance of 40 per cent, was made up by Jayadhar and Laxmi which were not subject to price control. In the allocation letters issued by the Textile Commissioner, mills were asked to take 60 per cent of their quota from Jayawant, Upland and Westerns and 40 per cent from the uncontrolled Jayadhar and Laxmi. The prices of Jayadhar and Laxmi ruled very high and in a representation addressed to the Textile Commissioner, the Committee pointed out that it was wrong in principle to treat certain cottons as free for purposes of price control and at the same time include them in the controlled distribution. The Committee urged that if on a consideration of stock position, Government decided to bring Jayadhar and Laxmi within the quotas, then the only way that could be done was to bring Jayadhar and Laxmi within the price control scheme also.

In reply, the Textile Commissioner stated that the question of inclusion of these two cottons in price control was a matter of policy which would be decided for the year 1951-52 in consultation with the Indian Central Cotton Committee.

Time Limits for the Ginning of Cotton Kapas: With a view to accelerating the distributing of cotton, the Textile Commissioner started calling upon holders of kapas to get their kapas ginned by specified dates. To start with, holders of kapas of 'Mungari' cotton were directed to get such kapas ginned before the end of February, while those of 'Bengal Deshi' cotton before the end of March. Towards the middle of May 1951, holders of 'Punjab American L.S.S.' kapas were told to get their kapas ginned before the end of May 1952.

Announcement of the Government of India's cotton Policy for the 1951-52 season

Towards the middle of June 1951, Government issued the following press communique indicating their policy with regard to cotton of 1951-52 season : —

"The Government of India, after very careful consideration, have decided to continue the control over cotton during the next year (September 1951 to August 1952). Government have taken note of the fact that in the current year, in the absence of any machinery for checking the qualities of varieties of cotton offered for sale, the bulk of the crop was sold at top ceiling rates, irrespective of quality, and admixture which took place. To rectify these defects, Government consider that quality control is essential, so that the better qualities get a better price and the poorer qualities are subject to a discount. Basic prices for standard qualities will be fixed and deviations from such standards will be subject to survey by the Sworn Surveyors of the East India Cotton Association.

2. In fixing the basic ceiling prices for cotton for the next season, Government have taken into consideration the actual prices paid this year for different varieties of cotton on the basis of which cloth and yarn prices have been fixed. They have accordingly decided that the basic ceiling prices of cotton should be raised by Rs. 50 per candy over the prices notified for the 1950-51 crop, with the provision of premia and discounts as usual. It is expected that cultivators will, generally get, in respect of really sound cotton, prices not below those which were actually realised by them for the current crop. The details of the price schedule will be published shortly. Government hope that the prices fixed and the provision of quality checks will not merely stimulate further production but also result in the betterment of the quality of the crop. Government also wish to make it quite clear that no increase in the prices of cloth and yarn manufactured from Indian cotton will be allowed during the next year.

3. Government have under consideration fixing a date before which all kapas of the 1950-51 crop must be ginned and authorising the Textile Commissioner to seize and requisition hoarded stocks of kapas or cotton of the current crop. If the new crop coming to the market is found to be mixed with the old crop, such cotton will be subjected to strict survey and paid for at not above the basic ceiling rates of 1950-51 with further discounts if necessary."

In accordance with the last paragraph of the above press communique, holders of kapas of Jarilla, Westerns, Dhollera, Kalagin, Oomra Deshi, Mathia, CPI and CPII, Central India, Buri American, Parbhani American, Gaorani 6 and 12 and Cambodia cotton grown in any place except in the Madras State were directed not to hold such kapas in

unginned condition beyond 31st July, and of Cambodia and Karunngani cottons grown in the Madras State beyond 31st August.

Appointment of Standing Committee of the Cotton Advisory Board

Towards the end of July 1951, the Board appointed a Standing Committee consisting of Mr. Neville N. Wadia (Chairman), Mr. R. G. Saraiya (Vice-Chairman), Mr. Chandulal Parikh, Mr. Gatulal Rangildas, Mr. M. R. Ruia, Mr. Hansraj Jeevandas, and Mr. Kalidas Sawhney (Secretary, I.C.C.C.), for the purposes of recommending suitable price differentials in the light of the new price of Jarilla, reviewing the working of the nominee scheme in each zone and selection of All-India Buyers' Panel and Zonal Panels and other matters concerning each zone, finalising the quality control machinery in consultation with the East India Cotton Association and for other matters arising in the day-to-day working of cotton control.

Madras High Court's Decision on the Nominee System of Purchase of Cotton

The validity of the nominee system for the purchase of cotton was challenged in the Madras High Court and the Court declared unconstitutional and void the Textile Commissioner's notification issued under the Cotton Control Order prohibiting in certain specified areas transaction in cotton, both purchase and sale, except by nominees listed in the notification. The High Court held that this notification had led to the creation of a small class of monopolists into whose hands the trade had become concentrated as a result of which thousands of merchants were prevented from carrying on their business. The Court also uttered a warning that the notification might ultimately result in the extinction of trade without in any way benefiting the public. The judgment of the Madras High Court necessitated revision of the distribution policy of Government and towards the latter part of October 1951, Government issued amendments to the Cotton Control Order, 1950, introducing a new marketing scheme, the salient features of which were as under :—

(a) The cotton trade would be licensed in three categories, viz., 'A' class licence, 'B' class licence, and 'C' class licence.

(b) Category 'A' would include those dealers who had sold a minimum quantity of 3,000 bales of Indian cotton directly to any manufacturer during any of the cotton seasons, 1948-49, 1949-50, and 1950-51 and had carried on business in cotton in more than one area specified by the Textile Commissioner in that behalf.

(c) Category 'B' would include those dealers who had sold a minimum quantity of 1,500 bales of Indian cotton grown in any of the areas specified by the Textile Commissioner to any manufacturer directly during any of the cotton seasons, 1948-49, 1949-50, and 1950-51.

(d) Category 'C' would include those dealers who had carried on business in cotton in any of the seasons specified by the Textile

Commissioner in that behalf during any of the cotton seasons, 1948-49, 1949-50, and 1950-51 and had held a valid licence under the Cotton Control Order on or after 1st September 1950.

(e) No dealer would be entitled to 'A' class and 'C' class licences at the same time.

(f) For the purpose of securing proper distribution of cotton among manufacturers, the Textile Commissioner was empowered to appoint, with the previous sanction of Central Government, a Distribution Committee for any specified area, consisting of such number of persons as he might deem fit.

(g) The Textile Commissioner was also empowered to make allotments to manufacturers of specified quantities of the required cotton to be acquired from specified licensees at specified prices and within a specified time.

(h) Where a Distribution Committee had been appointed for any area, manufacturers were prohibited from acquiring cotton grown in that area except in pursuance of the allotments made by the Distribution Committee.

Cotton Control Order Amended

On March 13, 1952 the Government of India amended the Cotton Control Order, 1950, to remove certain hardships and anomalies under the licensing system relating to the purchase and sale of cotton in India, according to a Commerce and Industry Ministry announcement. The changes, which modify the conditions necessary for obtaining 'A' and 'C' class licences are :—

(1) The requirement regarding sale of 3,000 bales of Indian cotton directly to any manufacturer during any of the basic years for issue of an "A" class licence has now been modified to a sale of a minimum quantity of 3,000 bales of cotton directly to any manufacturer during any of the basic years.

(2) An 'A' class licence will now be issued also to a person who is a member of the East India Cotton Association Ltd., Bombay, or, being a citizen of India, has been a member of the Karachi Cotton Association Ltd., during any of the cotton season, 1946-47 and 1947-48.

(3) The requirement that an applicant for 'A' class licence should have carried on business in cotton in more than one of the areas specified by the Textile Commissioner has been deleted.

(4) Any person, who held during any of the basic years a valid licence for carrying on business in cotton issued by the appropriate authority under any Central or State law shall be entitled to a 'C' class licence. No proof of actually having carried on business in the basic years is required.

(5) 'A' class licences will be permitted to purchase kapas.

(6) 'C' class licences will be permitted to sell Indian cotton to other 'C' class licences and to manufacturers besides selling to 'B' class licencees and 'A' class licencees.

*Announcement of 1951-52 and 1952-53 * Cotton Prices*

The Textile Commissioner also notified the maximum and minimum prices at which different descriptions of Indian cotton of the year 1951-52 season might be sold or purchased in a press note issued on 20th October 1951 (*vide* "At a Glance", pp. xxix).

Quality Control on Cotton

Towards the end of July 1951, the Cotton Advisory Board discussed the question of institution of quality control in respect of cotton crop of 1951-52 season and recommended that quality control should be exercised through the machinery of the East India Cotton Association. With a view to minimising far too many surveys, the Board suggested the assessment of the crop as and when it moved at specified intervals and get the Sworn Surveyors or the Textile Commissioner's Committee to declare the average quality of the crop and the prices therefor in terms of the Cotton Control Order. In the opinion of the Board, most of the transactions would be put through at those prices. Government accepted the Board's above recommendations and it was accordingly decided that the Textile Commissioner should from time to time specify the average quality and prices for the crop moving in any particular area and where the buyer or the seller alleged that the cotton was of a quality either of inferior or superior to the average quality specified by the Textile Commissioner, the matter should be settled by a reference to the East India Cotton Association. Where the decision given in this regard by the Sworn Surveyors of that Association was disputed by either of the parties concerned, it was laid down that the matter might be referred in appeal to the Textile Commissioner's Committee whose decision as regards the quality would be final and the prices should be fixed accordingly. The Textile Commissioner also drew up a detailed procedure regarding drawing of samples, their despatch, adjustments of expenses, survey of appeals fees, in consultation with the Standing Committee of the Cotton Advisory Board.

Appointment of Co-ordinating Committees

With a view to enabling the trade and the industry to regulate their dealings in cotton in accordance with the Cotton Control Order and for the purpose of effective supervision of the working of cotton control and for facilitating and undertaking equitable distribution of available supplies to mills, the Standing Committee of the Cotton Advisory Board appointed Co-ordinating Committees, to start with in Madhya Pradesh, Khandesh and Hyderabad, to work under the auspices of the Board.

* On the 7th July 1952, Government increased the basic minimum price for 1952-53 season by Rs. 55 per candy. (See Appendix A.)

Trading in Cotton Crop, 1951-52

Towards the latter part of November, the Textile Commissioner issued a notification declaring description, staple, class and the prices in terms of the Cotton Control Order, 1950, in respect of cotton moving in different centres of the Madhya Pradesh and also in the East and West Khandesh district of the Bombay State. At the same time, the Textile Commissioner also permitted trading in 'Ready Contracts' and 'Delivery Contracts' in respect of cotton grown in those areas. Subsequently permission for trading in cotton grown in other districts of the State of Bombay and also in the States of Saurashtra, Hyderabad, Madhya Bharat, the Punjab, Pepsu and Madras was granted by the Textile Commissioner who also declared the description, staple, class and price in respect of the varieties of cotton moving currently in those areas.

Proposed Stock Piling of Cotton

Towards the middle of October 1951, the attention of the Bombay Millowners' Association was drawn to certain reports which appeared in the press to the effect that Government were considering the feasibility of building up reserves of certain materials including raw cotton, to meet emergency deficits covering a period of about two to three years to come. The Association addressed a letter to Government enquiring whether the press reports were correct, and if so, what precise procedure Government poposed to follow in building stocks of cotton. While the Association had no objection to Government taking appropriate measures to meet an emergency, the only point they wished to emphasise was that representatives of the industry should be consulted before any far reaching decisions were finally made.

If the press reports referred to were correct, then it followed that there existed an emergency which, in the opinion of Government, warranted building up of essential stocks, which were usually imported from abroad, to ensure that the industry did not come to a standstill under any circumstances. The Association, therefore, desired that necessary steps might even now be taken to secure the building up of stocks of essential raw materials and stores of the industry, which for various reasons had to be imported from abroad. Stock piling of materials required by an industry of the size and type of say, the cotton textile industry of India, involved considerable amount of preliminary work such as preparation of a full list of the materials required together with the quantities and the countries from which they had to be secured. Further, exchange problems would also have to be overcome together with arrangements for financing the operations, which would consume a good deal of time and the Association, therefore, inquired whether in the opinion of Government a stage had been reached when the matter should be gone into in all seriousness.

Indian Central Cotton Committee

The 65th Meeting of the Indian Central Cotton Committee, which was held at Bombay in the first week of March 1952, is one of the most important meetings ever held. The Agenda for this meeting was a particularly heavy one, as it happened to coincide with the critical conditions in the cotton and cloth markets, and the I.C.C.C. as an expert body was naturally expected to give expert advice to Government, on the outstanding questions. We shall briefly refer to some of the subjects discussed in these meetings.

The I.C.C.C. at its March meeting considered the Press Note dated the 19th June 1951, issued by the Government of India, announcing an increase of Rs. 50 per candy in the basic ceiling price of cotton for the 1951-52 season over the price notified for the 1950-51 crop and their decision to introduce quality control with a view to preventing admixture of inferior with superior varieties of cotton so that the better qualities get a better price and the poorer qualities are subject to a discount. During discussions at the meeting, the view was expressed by the majority of the members that the increase of Rs. 50 per candy in the basic ceiling price was inadequate and unlikely to give the cultivators a higher income. The desirability of keeping any particular variety of cotton outside the price control was also considered by the Committee. It was felt that unless certain improved varieties which had recently been introduced by Agricultural Departments and which had proved to be very successful were kept outside the price control, there was not much chance of expanding their cultivation. The Government were accordingly addressed by the Committee. In reply, Government stated that they had decided to raise the ceiling prices of cotton by Rs. 50 per candy over the prices notified for the 1950-51 crop; that Government had carefully fixed the price differentials for each variety in relation to Jarilla and made necessary adjustments. On the 20th October 1951 Government issued the notification S.R.O. 1618 fixing the maximum and minimum prices for Indian cotton of 1951-52 season (*vide* "Cotton Industry at a Glance"). It will be seen that minimum prices for different varieties for the current season have also been fixed and they are the same as last season, while the premia for staple length 3|32 inch and 4|32 inch have been allowed in certain varieties only.

A special allowance was made in respect of Laxmi cotton which is a particularly good quality and whose cultivation deserves to be encouraged.

Shri Saraiya's Note

A note on cotton price policy in 1951-52 and 1952-53 was sent by Mr. R. G. Saraiya, in March 1952, which was considered by the Committee. Mr. Saraiya suggested that (i) it was necessary that there should be a moderate increase in the price of Indian cotton to the level indicated by the representatives of the Indian Central Cotton Committee to the Cotton Advisory Board, namely Rs. 950 for Jarilla fine 13|16 inch; (ii) the whole structure of prices for other varieties of cotton

and particularly for better varieties and longer staple lengths should be revised so as to bring it in line with the spinning values of the cotton as appraised by the trade and industry; (iii) Government should be extremely liberal in prescribing the highest grade and staple length upto which premia for the cotton may be awarded, so that there would always be an incentive to produce better and better cotton. In fact, a slightly higher price level for cotton coupled with a proper price incentive for superior grade and staple for each variety would not only encourage the production of better cotton, but also discourage any tendency to mixing.

Resolutions: The I.C.C.C. in a resolution regarding planned production of cotton noted with satisfaction the fact that the production of Indian cotton had increased from 29 lakh bales in 1949-50 to about 37 lakh bales in 1951-52. The Committee also welcomed the plan to produce 39 lakh bales in 1952-53, but pointed out that further diversion from food crops to cotton would seriously affect the country's food supply. The Committee felt that achievement of the Planning Commission target of 45 lakh bales in 1956 should be achieved through intensive cultivation, and land transformation.

In another resolution, the Committee regretted the recent failure of textile mills to lift their quotas, especially as it would have adverse reaction on the cotton crop. It also made the recommendation that the fixation of revised prices of cloth and yarn made from Indian cotton should be half-yearly or annually, instead of quarterly as at present. With regard to the 1952-53 crop, the Committee urged stabilisation of the price of cotton at the present level, though the prices of improved varieties should be suitably fixed with full premia for longer staples. Another important recommendation concerning import of raw cotton was that the cotton import and export policy should safeguard the interests of growers in India and the effect of large imports of foreign cotton on production of indigenous cotton should be carefully watched.

The Expansion of Cotton Production

Reference has already been made to the efforts to improve the crop. As a result of the measures taken, e.g. by expansion of area, provision of irrigation facilities, manuring, use of improved seeds and by improved agricultural methods, the additional production over 1950-51 as a result of these steps would not be more than 2.7 lakh bales. On this basis, the total production in the 1951-52 season may be placed at 36 lakh bales, as below:

Production in 1950-51	..	33.3 lakh bales
Additional production expected in 1951-52	..	2.7 " "
		36.0 " "

According to the trade, there are 3 different estimates in 1951-52, 36.2, 33.6 and 34.3 lakh bales. It will be noted that the estimated production of 36 lakh bales still falls short of the target production of

40 lakh bales. This shortage was due, principally, to bad weather conditions.

There is no doubt that thanks to the efforts of the I.C.C.C., the planning of the raw cotton economy is in the best hands. The mere fact that within a year the target of 40 lakh bales is almost going to be achieved for the Indian crop indicates the progress of cotton. Under the able and energetic guidance of its Chairman, Sir Datar Singh, the I.C.C.C. is certainly doing very useful work.

Also *vide* Appendix on Raw Cotton.

CHAPTER VIII

LABOUR

From the point of view of Industrial relations, the past year has been an extremely favourable one. The fact that cloth production in 1951 amounted to 4,076 million yards as against 3,655 million yards in the previous year itself shows the part played by textile labour in keeping up production. Unlike the earlier year, there was no strike of any magnitude, and even in the crisis months of March and April 1952, textile labour has preserved a cool head. In our view, labour in this industry has attained a certain maturity of temperament, thanks no doubt to the industrial policy of Government and the new legislation undertaken by the Centre such as the Employees' Provident Fund Act, 1952, and the Employees' State Insurance Act. Both these measures have had the effect of raising the cost of production and have therefore been bitterly criticised by the millowners. But there is no doubt that we have to move with the times in this respect.

We commend the patience of labour leaders and the large mass of textile workers for their reasonable attitude in recent weeks, when some of the mills were about to close down and some curtailed their shifts, in an effort to meet the situation arising from the large accumulation of stocks with the mills and the falling trend in prices. By resorting to strikes, or by showing their displeasure in other ways, labour would certainly have played into the hands of, at any rate, the less conscientious section of manufacturers, to whom complete closure of the mills would have been very welcome in recent months. Labour has wisely refrained from such acts and one may also credit them with a realisation of the paramount national need to keep up production at any cost in these critical days. After all, when prices are falling while production is maintained, it is the large mass of workers who stand to gain by the fall in the cost of living. One can therefore understand the quite righteous indignation of the working class when food prices in States like Bombay, have been raised to the extent of about 50 per cent. Justifiably, labour can feel that, when it is doing its best to maintain production even when manufacturers' interests would be served by lesser production, the State has no business to do anything that checks the downward trend in the cost of living. Actually, a reduction in cloth

prices has been suggested by Miss Maniben Kara in her presidential address at the 3rd Annual Convention of the Hind Mazdoor Sabha to stimulate demand for cloth. About 200 delegates from all over the country attended the Convention, which was a great success. Miss Kara said that the mills were threatening to close down shifts and throw several thousands of workers out of employment on the plea of accumulation of stocks. According to her, "it is not true that there is any abnormal accumulation. No doubt, the demand is not as brisk as it used to be. But the remedy against the situation is not curtailment of production, but lowering of prices. The textile magnates have to realise that the days of bumper profits are now gone and they must hereafter content themselves with lower profits. By curtailing production the millowners were trying to create an artificial scarcity in order to keep up prices. They should be prevented from resorting to that 'anti-social' course and it was the duty of the Government to take the necessary action. The working class would give their full support to any measure the Government took in that direction. There was no fall in the prices of essentials of life". She therefore called upon the Government to secure a high level of employment without which no programme of economic development would have any substance of reality. Though the Five-Year Plan had some defects, the attitude of workers is indeed one of support and co-operation.

Progressive Legislation

At the meeting of the Bombay Millowners' Association, Shri Vithal N. Chandavarkar, Deputy Chairman, referred in detail to the twin imposts by the Government on the industry in the form of Employees' State Insurance, and the compulsory Provident Fund scheme. He called the levy under the first item "iniquitous", as the industry was already spending on medical facilities, workmen's compensation and maternity benefits a sum which amounted to over three-quarters of the wage bill. He estimated that mills in Bombay city alone would be paying about Rs. 18 lakhs per year in the shape of insurance subsidy. He condemned the provident fund legislation as being "hasty" and contrary to the assurance given to the Standing Labour Committee that a draft Bill would be placed either before it or a sub-committee of that body. If the Government's policy was to consult those tripartite bodies only when it suited it, he wondered if any useful purpose was likely to be served by employers continuing to participate in the deliberations of these bodies. Shri Chandavarkar also criticised the Government's action in excluding factories belonging to the Government or local authorities from the operation of the measure. He estimated that, on the basis of the inclusion of dearness and other allowances in wages, Bombay mills would alone be paying over Rs. 1½ crores towards this measure.

The Employees' Provident Funds Ordinance, 1951

We shall now refer to these two controversial measures in detail. At the 12th session of the Standing Labour Committee, the question of

institution of contributory provident funds for industrial workers was discussed. The Government then promised to draft a bill regarding provident fund, after studying the various points raised at the conference and to circulate the draft to all members of the Standing Committee for their views. After circulation of the Bill, Government proposed to consider whether the whole committee or a smaller committee should examine the approved Bill in detail. Nothing was, however, heard from the Government about the draft Bill and the Committee of the Bombay Millowners' Association addressed a telegram to Government early in March 1951 enquiring whether Government proposed to introduce comprehensive legislation regarding provident fund for industrial workers, to which Government stated in reply that they had taken no decision regarding provident fund or gratuity for industrial workers. On 15th November 1951, however, Government promulgated an *Ordinance* to provide for the institution of provident funds for employees in factories and other establishments. This Ordinance, issued in disregard of all assurances previously given by Government, came as a great surprise to employers, and the Association addressed a representation to Government early in December 1951 lodging their emphatic protest against the manner in which Government had sought to rush the measure through. The Association pointed out that, as Government did not bring forward any legislative measure for introduction in Parliament though it was in session upto the middle of October, it was quite apparent that Government had not taken any decision in the matter until then and that the necessity for the measure, if any, could have arisen only between the date on which Parliament was prorogued and the date on which the Ordinance was actually promulgated; but the Ordinance did not throw any light on the precise nature of the circumstances which, in the opinion of the President, existed and which rendered it necessary for him to take immediate action in regard to institution of a provident fund for workers. In the opinion of the Association, the Ordinance sought to ignore completely the principle of prior consultation and discussion with the interests concerned on all matters concerning industry and labour, which should have helped Government in no small measure in evolving statutory proposals for the acceptance of the Legislature, free from various defects, inaccuracies and anomalies. Even if special circumstances existed—in this particular case, the Association felt no such circumstances existed—where action had to be taken without following the usual tripartite discussions, the Association submitted that at least the organisations concerned should have been informed of the circumstances under which Government were departing from the established and accepted procedure. If the tripartite conferences were to be made use of only for consultation whenever it suited Government, the Committee felt that the machinery was a costly appendage which the tax-payer could ill afford at this juncture.

Without prejudice to their objection to the principle of a compulsory provident fund for industrial workers, the Association offered their observations on some of the most important principles enunciated in the

Ordinance which were as under. As typical of the reactions of mill-owners, the following comments are of interest and importance:

Under the Ordinance, contributions to the fund were based on basic wages plus dearness allowance including the cash value of any food concession allowed to the employee. The Committee pointed out that the inclusion of dearness allowance or any other allowances was an innovation so far as this country was concerned as no existing provident fund, according to the Committee's information, calculated the employers' or employees' contribution on any basis other than the basic salary which did not include dearness allowance or any other allowances. The reasons for excluding such allowance were, firstly, that dearness allowance, as in the case of the cotton textile industry, was an amount which varied monthly, according to the cost of living index. Secondly, contributions to a recognised provident fund were free from taxes, taxation in individual cases being adjusted every month on the basis of the estimated total contributions and accretions for a full period of 12 months and where contributions were payable on dearness allowances also, no such arrangement was possible as the total income in such cases could only be adjusted at the end of the year and not before, as in the case of salaries. Thirdly, the Coal Mines Provident Fund Scheme of 1948 provided for contributions on basic wages only, and even in the Model Provident Fund Rules for industrial employees, there was no provision for the inclusion of dearness allowance and other allowances for the purpose of calculating provident fund contributions.

The Ordinance threw very little light on the extent of the control which individual employers would have on provident funds established under the Ordinance in their own units. There was, however, a reference to boards of trustees for the administration of funds on a tripartite basis and it was not clear whether there would be one such board for every unit or whether all provident funds in a centre would be administered and managed by one board in that centre. Whatever the position, it seemed certain that the employer was required to keep the accounts relating to the fund in such form as the board might decide, and otherwise generally to obey the orders of the board. The Ordinance also seemed to suggest that what Government had in view was a Central Fund, to which the Association were strongly opposed.

It appeared under the Ordinance that the employer was expected to meet the entire cost of maintaining an establishment for the purpose of keeping the provident fund accounts, and also to contribute to the expenses of maintaining the board, its staff and the inspectors referred to in the Ordinance. This was an imposition to which the Association took serious exception. Provident Fund was an amenity provided by the employer, for his employees to provide them with a sum of money at retirement. The fund was, ordinarily, an irrevocable trust, its constitution being dictated by the provisions of the Income-tax Act; the income and expenditure of the fund was listed and incurred according to the rules of the fund and accounted for and audited every year, and

every beneficiary was given a statement showing the position of his accounts at the end of each year. The monies of the fund could only be invested in securities approved for the purpose. Every subscriber before joining the fund was given a copy of the rules, and he joined the fund with the full knowledge of his rights and liabilities in the fund, and the Association submitted that if the rules of the fund were duly followed—which could easily be verified in every case—there was no room for any outside control being maintained by Government at the expense of the employer. If Government, however, believed that such inspection or administration should be done in public interest, then the Association submitted that the cost of such inspection or administration should legitimately be a charge on the general revenues of the country.

One of the fundamental objects underlying any provident fund was to induce an employee to continue to be in the service of an employer for a reasonably long period, and the Association pointed out that this object had been sought to be defeated by the Ordinance, for it was laid down in clause 17 that the amount of accumulations to the credit of an employee should, in cases where he leaves his employment and obtains re-employment in another factory, be transferred to the credit of his account in the latter factory. The Association stated that the present position was that where an employee forfeited, under the provident fund rules of which he was a member, the employer's share of the contribution, the amount was not allowed to lapse to the employer, but was forfeited and credited to a special account in the provident fund for the benefit of other beneficiaries in the fund. The Ordinance visualized the amount standing to the credit of a worker following him from one employer to another and so on, probably till he finally ceased to work, but it did not say whether the total amount would be really payable to him on the basis of his service in one factory or on the basis of the total life by him as a worker, active or otherwise, in one and the same industry or in different industries, and what would happen if, for instance, both the contributions were not ultimately paid to him or if an employee left a scheduled industry and was re-employed in a non-scheduled industry.

Clause 17 (c) of the Ordinance empowered Government to exempt from the operation of the Ordinance any class of persons employed in any factory, if Government was of the opinion that such class of persons was entitled to old age benefits which were on the whole not less favourable to such persons than the benefits provided under the Ordinance. In the opinion of the Association, the exemption did not go far enough. The Association referred in this connection to the discussions which took place at the twelfth session of the Standing Labour Committee when the Chairman in reply to a specific question from an employers' delegate attending the session, stated that " compulsory provident fund was a substitute for gratuity on discharge ". The Association presumed that Government had not resiled from the position taken up by their spokesman at the Standing Labour Committee and they suggested that the omission be set right particularly in clause 17 (c), as otherwise mills

and industrial establishments might be compelled to give both provident fund and gratuity.

The provident fund scheme visualized in the ordinance which, in fact, formed the principal part of the Ordinance, was yet to be framed by Government, and the Association expressed the hope that, here at least, Government would take into confidence the interests concerned and give them an opportunity of examining and commenting upon any scheme which Government might have in view.

An act of Parliament in middle of February 1952 replaced the above Ordinance. The statement of objects of the Bill read as follows :—

"The question of making some provision for the future of the industrial worker after he retires or for his dependents in case of his early death, has been under consideration for some years. The ideal way would have been provision through old age and survivors' pensions as has been done in the industrially advanced countries. But in the prevailing conditions in India, the institution of a pension scheme cannot be visualized in the near future. Another alternative of a gratuity scheme, however, is that the amount paid to a worker on his dependents would be small, as the worker would not himself be making any contribution to the fund. Taking into account the various difficulties, financial and administrative, the most appropriate course appears to be the institution compulsorily of contributory provident funds in which both the worker and the employer would contribute. Apart from other advantages, there is the obvious one of cultivating among the workers a spirit of saving something regularly. The institution of a provident fund of this type would also encourage the stabilisation of a steady labour force in industrial centres.

The subject of legislation for institution compulsorily of contributory provident funds in industrial undertakings was discussed several times at tripartite meetings in which representatives of the Central and State Governments and employers and workers took part. A large measure of agreement was reached that there should be such legislation. Further, a non-official Bill on this subject was introduced in the Central Legislature in 1948 and was withdrawn only on an assurance given that Government itself would soon consider the introduction of a comprehensive Bill. The view that the proposed legislation should be undertaken was lastly endorsed by the conference of Provincial Labour Ministers held in January 1951. It may be added that a statutory Contributory Provident Fund already exists for workers in coal mines, covering about 3,00,000 persons. This has been in operation for about five years and is working very satisfactorily.

The Bill provides for institution in the first instance of contributory provident funds in the six major organised industries named in Schedule I, except undertakings owned by the Central or a State Government or by a local authority. There is also a provision empowering the Central Government by notification to add other industries to the Schedule or

to apply the Act to industrial undertakings employing less than fifty persons.

To avoid any hardship to new establishments, a provision has been made for exempting them for a period of three years and similar exemptions are given to other establishments which are less than three years old till they have been in operation for a period of three years in all. The rate of contribution will be 6¼ per cent of the total emoluments of the worker, the worker and the employer each contributing these amounts. Further, the scheme could empower payment of a higher subscription by the workers at their option.

Where Provident Funds exist in private industry, contributions are usually a percenatge of the basic wage. Unlike Government Departments, wages in private industry have not, however, been rationalised and there are very great variations in the level of basic wages in private industry, even in different units in the same industry. If contributions are reckoned on the basis of basic wage only, there will, therefore, be wide changes in the degree of benefit received. This will be unfair to the workers and may also penalise those employers who have brought the level of basic wages more in accord with current requirements. Government appreciates that dearness allowance is a variable factor depending on the cost of living. Nevertheless, for the reasons explained, Government is satisfied that contributions to the Provident Fund should be on the basis of basic pay plus dearness allowance. This should not be construed as in any way implying that dearness allowances on the existing rates are to be recognised as a permanent measure."

Employees' State Insurance Bill, 1951

This Bill along with amendments was passed and became law on 16th October 1951. Government appointed 24th November 1951 as the date on which the provisions of most of the Sections would come into force. In pursuance of provisions of 73(A) (3), Government issued a notification fixing 1¼ per cent of the total wage bill of the employer in some areas, and ¾ per cent in other areas, constituting the employer's special contribution. This came into effect from 24th February 1952.

Employers' Views

The views of employers deserve notice. We have already referred to the views of Shri V. N. Chandavarkar of the Bombay Millowners' Association. Sir Sri Ram of Delhi said: " So that there may be no misunderstanding, I should like to say emphatically that we, at any rate in this company, cannot be accused of want of sympathy for our workers. My objection is to hastily introduced schemes, without sufficient discussion and imposing unexpected burdens upon industry. Again, as you know, the State Insurance Scheme was placed upon the Statute Book at the fag end of a Parliament session when the session was being extended from day to day. We had introduced an Insurance Scheme of

our own long before the Government thought of one, which cost the workers and the company much less for similar benefits; and we would have liberalised our scheme if the Government had not come into the picture; but I think, you will agree that the policy of Government has not been fair to employers like ourselves who have been ahead of others, in providing benefits for our workers, for while we are compelled to adopt the benefits laid down by the State, we are, simultaneously, forbidden to withdraw any other benefits we may have been giving before."

Similarly, at the meeting of the Tata Mills Ltd., in March 1952, Shri Naval H. Tata, a progressive and liberal-minded employer, referred to the additional burdens placed on the industry by way of these new schemes. According to him, the *per capita* earnings of labour have risen by 27 per cent; electricity duty by 33 per cent; stores, etc. by 50 per cent; and fuel oils by 100 per cent since 1948. In view of these increases, Shri Naval Tata stated in an outspoken manner that a cotton mill known for its honest dealing would have its profits considerably reduced, and if large profits were shown, they must be of the illicit variety.

Bonus to Cotton Mill Workers for 1950

The Industrial Court's Award granted a bonus to cotton mill workers employed in the Bombay cotton mill industry equivalent to 15 per cent of their annual basic earnings in 1950. The mills' as well as workers' associations appealed against the Court's Award. Bonus in accordance with the Court's orders was however paid to the workers towards the end of October 1951, without prejudice to the right or liability of mills to make adjustments according to the decision of the Appellate Tribunal. That Tribunal heard the appeal towards the end of January 1952, and in the latter part of February 1952 confirmed the quantum of bonus granted by the Industrial Court.

Since the assumption of office by Shri V. V. Giri, as Labour Minister of the Government of India, a more practical approach to the solution of labour problems has been in evidence. The question of bonus to cotton mill workers in Bombay for 1951 was settled by a voluntary agreement, unlike previous years when it was decided by a tribunal, between the Bombay Millowners' Association and the Rashtriya Mill Mazdoor Sangh, and in accordance therewith a bonus of 3 months was agreed to be paid to workers for the year 1951. It may be recalled that in 1948 the bonus awarded by the Industrial Court was equivalent to wages for 4½ months, in 1949 for 2 months, and in 1950, 15 per cent of the basic wages. A similar voluntary agreement was arrived at in June 1952, for Ahmedabad also, in regard to payment of bonus for the year 1951.

APPENDIX A

RAW COTTON IN INDIA AND THE WORLD

(PRODUCTION, CONSUMPTION, IMPORT & EXPORT ASPECTS)

The 1951-52 cotton season has on the whole been a season of comparative plenty as far as cotton supplies to the Indian mills are concerned. In the preceding pages, we have seen that in the first quarter of the year 1952 there was a general and sharp decline in commodity prices all over the world, with cotton taking the lead in the downward movement. Where last year and in the earlier years the chief headache to the mills was the lack of cotton supplies, particularly when Pakistan cotton became scarce, it is now a much more comfortable position statistically. There is no doubt that even in cotton the sellers' market has come to an end and cotton producing countries, except India, are confronted with the problem of disposal of surplus cotton. In Egypt particularly, and to some extent in Pakistan, frantic indeed are the efforts made to dispose of surpluses. The world has definitely embarked on an era of plenitude in regard to raw cotton.

The Indian Central Cotton Committee at its session held in March 1952 noted with satisfaction the fact that, as a result of the 'grow-more-cotton' campaign undertaken by the Central and State Governments, the production of Indian cotton had increased from 29 lakh bales in 1949-50 to about 37 lakh bales in 1951-52, while 39 lakh bales is the target aimed at for the year 1952-53. By 1952-53, a stage will be reached when further diversion of cultivation from food crops to cotton and other cash crops will seriously affect food supplies in the country. According to the Union Minister for Agriculture, a rough estimate of the net diversion of land from the cultivation of food grains to cash crops like cotton, jute and oilseeds was about 33 lakh acres in India as a whole. This is only a rough estimate but there is no doubt that further diversion cannot be contemplated. The available acreage in 1952-53 for cotton must therefore be accepted as the basic allocation. It is true that the Planning Commission has proposed increase in the production of cotton to the target of 45 lakh bales in 1956, but that is to be achieved mainly through land reclamation and intensive cultivation. The I.C.C.C. therefore recommended that (i) the cultivation of improved varieties of cotton should be extended to all such areas where improved seed is not being sown at present, and adequate plant protection measures should be taken, (ii) all the area growing irrigated cotton should be suitably manured to increase the yield per acre, (iii) out of the 14 million acres now growing unirrigated cotton, about 3 million acres should be provided with irrigation facilities by constructing minor irrigation works and such other measures as are feasible, and (iv) the Government of India should provide the fertilisers and funds required for securing irrigation facilities expeditiously. If the foreign supply

situation becomes easier, one may even ask in the present context of food supply in India whether this country should at all attempt to increase its total production of cotton beyond, say, 40 lakh bales.

Public psychology in the matter of policy has, since March 1952, been flowing strongly in favour of decontrol. The slump in prices actually touched off this debate and, for many weeks, speculation was rife about cloth decontrol. The Government of India have made it clear that decontrol, at any rate of cotton, is out of the question. There ought to be control over cotton production, distribution and prices because stability has yet not been reached in regard to the cotton economy. We are aware that very influential persons in the cotton trade have made no secret of their views in this matter. All that can be said is this : it is very doubtful whether an uncontrolled cotton economy can ensure a sufficiency of cotton supplies at economic prices to the mill industry. Even as it is, though cotton prices have moved down, it is found that costs of production have gone up in some varieties of cloth and the government have to revise the prices. After all, government have a duty at least to stabilise the price of food and cloth, if not to bring them down. It is too early in the day to conclude that decontrol of raw cotton will help to stabilise prices, if not roll them back. In our opinion, government have done well to continue in their policy. Nothing has happened to warrant a change therefrom.

Cotton Price Policy

Discussions as to the price policy for 1951-52 were started by the Government of India in May 1951 and the Cotton Advisory Board considered two proposals for fixation of cotton prices : (1) a basic ceiling price of Rs. 950 per candy for Fine Jarilla 13/16″ (equal to Rs. 930 for Jarilla 25/32″), subject to adjustments of premia for qualities of cotton ; (2) one maximum price for each variety of cotton the maximum ceiling price being Rs. 950 for Fine Jarilla 13/16″. In recommending this price level, the following points were borne in mind : (*a*) the price of Kappas paid to the farmer during the past two years ; (*b*) the price of cotton ruling in world markets and the probable trend in 1952-53 ; and (*c*) the desirability of encouraging cotton cultivation upto the point of 40 lakh bales.

Actually, the maximum price fixed by the Government of India for 1951-52 was Rs. 820 per candy for Fine Jarilla 25/32″. The basic ceiling price fixed for the 1951-52 crop was apparently higher by Rs. 50 per candy than the ceiling price fixed for 1950-51 crop. Details of the prices of other varieties are given in an earlier chapter. In the eyes of a section of the cotton trade, the price fixation did not go far enough. It was pointed out that the essentials of a constructive price policy which would ensure production of adequate supplies of different staples is that the grower should get a return which is not less than that available from other competing crops. For this condition to be satisfied, the basic price of Fine Jarilla 25/32″ should have been fixed at Rs. 930 per candy, according to these people. Further, the price differentials allowed for

superior varieties of cotton in the price schedule did not offer sufficient incentive to the grower to produce the requisite qualities of cotton. In a controlled economy, it was pointed out, the grant of adequate premium for superior varieties is a necessary administrative measure to produce the most favourable conditions, which in times of *laissez faire* would be brought about by the natural play of economic forces.

As regards the argument that further increase in price would have an inflationary effect, the answer given by this school of thought is that, though the effect of higher prices might be to add to the existing inflation, it would be more than offset by the permanent effect in acting as an incentive to increase production of cotton. Furthermore, thereby the drain on foreign exchange for obtaining foreign cotton will also be reduced. The total value of the cotton imported during 1951-52 is likely to exceed the total value of the Indian cotton crop during that season. It is therefore urged that there should be a moderate increase in the price of Indian cotton to Rs. 950 for Jarilla 13/16". The whole structure of prices for other varieties, particularly longer staples, should be revised so as to bring it in line with the spinning values of the cotton. The incentive to produce superior grades must be kept up not only to encourage the output of quality cotton but to discourage the tendency to mix.

No increase was made in the ceilings for the 1952-53 crop. But the 'floor' prices were raised up to Rs. 55 per candy for the 1952-53 crop.

Imports of Cotton

To view the raw cotton problem in its proper perspective, it is necessary that the reader should have a fair idea of the size and values of the imported cotton in 1951-52. According to a knowledgeable source in the cotton trade, the following are the comparative figures :—

Total value of Indian and foreign cotton compared

(1 bale : 392 lbs.)

	Bales	Price per bale	Figures in lakhs
Foreign Cotton:		Rs.	Rs.
American ...	11,25,000	950	1,07,00
African ...	1,50,000	1,200	18,00
Egyptian ...	1,50,000	1,600	24,00
Sudan ...	30,000	1,200	3,60
Others:			
Peruvian, Afghan, etc. ...	50,000	1,000	5,00
Total ...	15,05,000		Rs. 1,57,60

	Bales	Price per bale	Figures in lakhs
		Rs.	Rs.
Indian Cotton :			
Commercial crop ...	33,00,000	410	1,35,30
Non-factory consumption ...	2,50,000	300	7,50
Total ...	35,50,000		Rs. 1,42,80

Since this estimate was prepared, there has been a fall in foreign cotton prices no doubt, but these figures will help to show how much saving can be effected if Indian production improves in respect of both production and quality.

Foreign Trade in Cotton

In pre-war years, exports of Indian cotton ranged from 30 to 40 lakh bales per year. During the war, exports fell off, and reached 1,60,000 bales in 1942-43. After partition, India became a net importer of cotton, and exports of about two to three lakh bales per year of the shortest staples which are not ordinarily consumed by Indian mills were being allowed to be exported. In 1950-51, only 1,84,000 bales were exported. To take Bengal cotton, for instance, there is a surplus in the country and the I.C.C.C. at its March 1952 meeting recommended to government that the export duty on this variety should be cut by half so as to bring exports upto the quota allowed.

The export duty on raw cotton was reduced from Rs. 400 to Rs. 200 per bale from March 15, 1952.

Production in 1951-52

Production in 1950–51	...	33.3 lakh bales
Additional production expected to be achieved in 1951–52	...	2.7 lakh bales
		36.0 „ „

The above estimated production of 36 lakh bales for 1951-52 fell short of the target of production by 4 lakh bales, due entirely to bad weather conditions.

The additional production of 7,54,596 bales in 1951-52 over 1950-51 was proposed to be achieved as follows :—

(i)	By expansion of area	...	5,81,204 bales of 392 lbs.
(ii)	By provision of irrigation	...	24,633 „ „
(iii)	By inter-cropping of other crops	...	51,523 „ „
(iv)	By manuring	...	24 913 „ „
(v)	By use of improved seeds	...	56,224 „ „
(vi)	By improved methods	...	16,099 „ „
			7,54,596

These figures will show that a good deal of planning has been brought about in the cotton economy of India, thanks to the expert advice tendered by the Indian Central Cotton Committee and the government's readiness to realise that such advice is worth taking.

The Indian Crop, 1951-52

According to the Chairman of the Indian Central Cotton Committee cotton production in the Indian Union during 1951-52 is expected to be higher by 6 per cent as compared with that in the previous season. It may be noted that in the previous season, the output was estimated at about 33 lakh bales. On this basis, production in 1951-52 may be placed at 39 lakh bales. At the March 1952 Central Cotton Committee meeting, the Chairman, Mr. Datar Singh, revealed that overall target for increasing production in 1951-52 would amount to 7.54 lakh bales. Despite bad weather in some parts of the country, he stated that the current season's cotton crop was fairly satisfactory. He also emphasized the need to augment the output of cotton further in the Indian Union in 1952-53 in view of the cotton shortage prevailing in the country at the present time. The target was fixed at 4 million bales.

Mill Consumption and Stock of Cotton in Bales

(Year ending 31st August)

—	1948-49	1949-50	1950-51	1951-52 Estimated
Carry over (with mills) ...	15,76,0?2	......	14,24,579	15,37,925
Cotton Consumption :				
Indian ...	31,23,915	25,44,174	25,16,963	29,00,000
Pakistani ...	4,10,956	2,03,442	17,578	......
Egyptian and other foreign	7,19,765	9,37,269	10,87,547	11,00,000
Total ...	42,54,636	36,84,885	36,22,088	40,00,000

World Cotton Crop in Bales of 400 lbs.

Year	America (Linters included)	India	Egypt	Russia	China	Others	Total
1939–40	13,147	4,909	1,738	4,050	1,900	5,155	30,899
1940–41	13,966	6,080	1,896	4,300	2,300	4,442	32,689
1941–42	11,844	6,223	1,650	4,000	2,400	5,060	30,772
1942–43	...	4,702	...	...	...	...	...
1943–44	...	5,259	...	...	...	...	...
1944–45	11,900	3,498	960	2,500	800	4,386	24,044
1945–46	8,655	3,530	1,080	2,200	600	3,950	20,015
1946–47	8,526	3,566	1,210	2,600	500	3,875	20,277
1947–48	11,300	2,188*	1,400	2,950	1,000	5,674	24,440
1948–49	14,700	1,767*	1,800	2,600	400	5,568	26,832
1949–50	15,973	2,628*	1,786	2,700	...	...	31,144
1950–51	9,877	2,926*	1,762	3,300	...	...	27,698

* Relates to Indian Union.

Cotton and its Economics

Cotton is universally known as an international textile fibre possessing unique properties. The best types are produced in sub-tropical countries, although it can also be grown in tropical areas. Climatic conditions exert a great influence on the quality, and adequate rainfall is necessary for satisfactory cultivation. Cotton has now been standardized to so great an extent that the users can have a choice of almost any quality required for their various needs. These different characteristics are length, strength, regularity of staple, colour and softness.

The chief producing countries are the U.S.A., the Union of India, Pakistan, Soviet Union, Brazil, China, and Egypt, although it is also grown in 14 other territories on a fairly large scale. U.S.A., India, Pakistan, Brazil and Egypt represent the main sources for world trade. The quantities produced in Russia and China are generally consumed internally, although varying quantities have been sold abroad from time to time. The chief importing countries before the war were Japan and the U.K. which between them accounted for almost half of the world's total imports. The remaining principal importers were largely European countries. The longest and finest staple cotton, excluding the specialised Sea Island (West Indies) varieties which are considered super qualities, are produced in Egypt, while the medium qualities are produced in the U.S.A. and Brazil. The coarse and short-staple varieties are produced mostly in India. Between these two extremities lie the rest of the varieties grown in the different countries. The Egyptian varieties which are reputed for their length of staple and fineness of quality come next to the Sea Island; next in order to the Egyptian types comes the group of American cottons grown in America, Sudan, East Africa and other countries. The bulk of the cotton trade of the world is in relation to this group of American cottons. The cottons of Brazil and other South American countries are partly of the American type

and partly of the Bourbon types. It is considered that these styles are the real competitors to the American product. Little is known of the Russian and Chinese cottons though in respect of the bulk of their crops they occupy positions of importance. Russia is reported to have succeeded lately in growing cotton of natural colours like grey, green, etc. Cultivation of these coloured cottons on a large scale is not reported.

The Dominion of India is now the third largest cotton producing country in the world. The present area under cotton in India is about 75 per cent of the area under cotton in the U.S.A., but the production is about 18 per cent of the U.S.A. crop (1949-50).

World Production, Consumption and Carry-over

The Tables below give relevant details.

World Supply and Distribution of Cotton

(Year beginning August 1) (1,000 bales) (1 bale = 478 lbs. net)

—	1938-39	1947-48	1948-49	1949-50	1950-51	1951-52
SUPPLY:						
Stocks on hand ...	25,000	18,400	14,700	14,900	16,500	11,000
Production ...	29,500	25,200	28,900	31,200	27,700	33,100
Total ...	54,500	43,600	43,600	46,100	44,200	44,100
DISTRIBUTION:						
Consumption ...	30,600	28,700	28,300	29,400	33,000	
Destroyed ...	200	200	400	200	200	
Stocks on hand July 31 ...	23,700	14,700	14,900	16,500	11,000	
Total ...	54,500	43,600	43,600	46,100	44,200	

Production of Cotton by Important Countries

(Year beginning August 1) (1,000 bales)

Country	1938-39	1947-48	1948-49	1949-50	1950-51	1951-52
Mexico ...	293	423	528	917	1,156	1,180
U.S.A. ...	11,617	11,658	14,649	15,973	9,877	15,212
China ...	2,301	2,150	2,120	1,700	2,330	2,330
INDIA ...	5,151	2,625	2,000	2,390	2,735	2,800
Pakistan ...	3	900	810	1,020	1,220	1,320
Europe (whole) ...	158	130	155	161	228	261
U.S.S.R. ...	3,800	2,600	2,600	2,700	3,300	3,400
Argentine ...	260	412	435	515	500	500
Brazil ...	1,989	1,260	1,530	1,350	1,550	1,350
Peru ...	378	307	270	378	373	370
A. E. Sudan ...	263	235	288	305	450	270
Egypt ...	1,728	1,320	1,840	1,786	1,762	1,586
Uganda ...	254	139	327	287	290	285
World Total (including other countries) ...	29,532	25,258	28,933	31,144	27,698	33,110

The following table shows the relative importance of India as a producer of cotton in respect of acreage and yield, for the past 15 years :—

Year	Area (in 000 acres)			Production (in 000 bales)		
	India	U.S.A.	Egypt	India	U.S.A.	Egypt
1937-38	25,476	33,623	2,033	5,722	18,945	2,281
1938-39	23,490	24,248	1,830	5,051	11,944	1,728
1939-40	21,[illegible]80	23,805	1,675	4,909	11,816	1,801
1940-41	23,311	23,861	1,735	7,080	12,565	1,900
1941-42	24,151	22,236	1,706	6,223	10,742	1,735
1942-43	19,203	22,602	733	4,702	12,820	877
1943-44	21,086	21,652	740	5,258	11,128	740
1944-45	14,843	20,009	885	3,580	12,230	962
1945-46	14,[illegible]68	17,241	1,020	3,530	9,015	1,082
1946-47	14,860	18,190	1,259	3,566	7,400	1,252
1947-48*	10,655*	21,269	1,302	2,188*	11,658	1,320
1948-49	11,293	22,678	...	1,767	14,649	1,840
1949-50	12,173	27,230	1,756	2,628	15,973	1,786
1950-51	13,859	17,850	2,050	2,926	9,877	1,762

* Figures from 1947-48 relate to Indian Union only.

The production of cotton in U.S.S.R. in 1949-50 was 2,700,000 bales as compared with 2,600,000 bales in the previous year. In 1950-51 the crop was 3,300,000 bales.

Cotton—A Cash Crop

The common crops of India fall into two groups : those grown chiefly for sale which may be termed the cash crops, including cotton and other fibres, sugarcane and oilseeds ; and crops grown for food, especially rice, jowar, etc. Quality is an important factor in the cash crops (but it is impossible to define it fully), while nutritive value is more important for the food crops. The cotton crop has been on the decline since 1941-42. The total area under cotton in the Indian Union in 1948-49 was 11,293,000 acres of which 50 per cent roughly were under improved varieties. The area in 1949-50 was 12,173,000 acres and yield 2,165,000 bales. The figures for 1950-51 and 1951-52 were respectively 13,85,900 acres and 3.3 million bales ; 14.46 lakhs acres and 3.6 million bales.

India, which enjoys the distinction of being the birthplace of cotton, grows at present mostly short and medium stapled * cotton, the finer and longer stapled varieties being mainly confined to Egypt and America. The various varieties grown in India can be grouped under two principal classes, viz. (i) the Asiatic, and (ii) the American. The area under Egyptian types is practically negligible. The bulk of Indian

* "Staple" may best be defined as "the average length of the bulk of the fibres of the cotton". It is usually found by taking a tuft of cotton and after removing the short fibres by drawing the same between fingers and thumbs, measuring the average length of the fibres remaining.

cotton crop is of the Asiatic class and only a fraction belongs to the American group.

Production of Cotton by Varieties in the Union of India

We give below the estimates of areas and yield of cotton classified according to the trade descriptions for the years 1949-50 and 1950-51 :—

Final Estimate Cotton Crop—1948-49, 1949-50 and 1950-51

(000's omitted)

Description	Acreage		Yield in bales	
	1949-50	1950-51	1949-50	1950-51
Bengals	839	960	420	473
Americans	535	720	122	202
Oomras	3,478	3,388	428	619
Broach	685	777	259	212
Surti	265	325	73	88
Dholleras	1,076	1,760	257	384
Others	5,295	5,929	1,069	948
Total ..	12,173	13,859	2,628	2,926

The following table shows raw cotton production in India from 1938-39 to 1951-52 :—

Raw Cotton Production in India

Official Estimates.

(Acreage and Yield)

—	Area (In thousands of acres).	Out-turn (In thousands of bales).	Yield (per acre in lbs.)
1938-39 (pre-war)	23,490	5,051	86
1939-40	21,580	4,909	91
1940-41	23,311	7,080	104
1941-42	24,151	6,223	101
1942-43	19,203	4,702	98
1943-44	21,086	5,258	100
1944-45	14,843	3,580	97
1945-46	14 668	3,530	96
1946-47	14,860	3,566	96
1947-48 (Union of India) ..	10,655	2,188	80
1948-49 („) ...	11,293	1,767	61
1949-50 („) ...	12,173	2,628	72
1950-51 („) ...	13,859	2,926	83
1951-52†(„) ...	13,732	3,300	...

† Third estimate.

Establishment of the Indian Central Cotton Committee in 1921

A great deal of the improvement effected in Indian cottons is due to the Indian Central Cotton Committee which was established in 1921 to improve the quality of Indian cotton in particular and to promote the cause of cotton cultivation in this country in general. The Committee has rendered signal service in the direction since its inception. Its chief functions were (i) to advise the Central and State Governments on all questions on cotton referred to it, and to suggest suitable measures for the improvement and development of the industry, (ii) to finance and to direct research work on the problems connected with the improvement of Indian cotton including investigations into the relationship between the cotton plant and its environment, the diseases and pests of cotton and the lint qualities of the existing as well as newly evolved types, (iii) to finance schemes intended to bring into general agricultural practice the results of economic importance obtained from research, and (iv) to finance schemes, wherever possible, for extension of long and medium staple cottons of improved variety and their marketing.

Funds of the Indian Central Cotton Committee must be augmented

The funds of the Indian Central Cotton Committee are derived mostly from the cess of 2 annas on every bale of Indian cotton exported from India or consumed in mills in the Indian Union. Until the entry of Japan in the last war the Central Cotton Committee enjoyed a sound financial position with an income of 6 to 8 lakhs of rupees per year. With the entry of Japan the receipts from the cess fell off considerably and the Committee drew upon its surplus balance to continue its programme of activities. As the surplus got depleted, the Committee recommended to Government in 1945 that the rate of the cess should be doubled. Before doing so, however, the Government of India decided to make a grant from the "cotton fund" which was specially built from the proceeds of the import duty on raw cotton imposed by the Cotton Fund Ordinance, 1942.

The Government of India decided in August 1948, however, that in order to enable the Committee to have a permanent source of income, it was necessary to double the rate of cess on cotton and to permit the Committee to continue to receive the grant from the cotton fund. The Government, therefore, passed an Act in the Constituent Assembly in September 1948, seeking to increase the rate of cotton cess from 2 annas per bale to 4 annas per bale. They also amended Section 12 (2) of the Indian Cotton Cess Act which at present precludes the Committee from spending any moneys received by it on development schemes.

With the passage of this Act, the amount of the cess, namely, 4 annas per bale, is calculated to bring a revenue of about Rs. 9,00,000 per year. We feel that this amount is all too inadequate for the Indian Central Cotton Committee and we strongly suggest to the Government of India the desirability of placing at the disposal of the Committee a

grant of Rs. 25,00,000 per year. There is no doubt that the Committee has done valuable work in improving cultivation of cotton, and if it is allowed to continue its constructive activities for the promotion of cotton research, it will pay the country many times over in the years to come. Compared to the amount spent in the U.S.A., the amount now being spent in India by the Government on cotton research, and looking to the size (33,00,000 bales) and the value (Rs. 135 crores) of the cotton crop of the Dominion of India, the grant of Rs. 25,00,000 per year on cotton research will work out to less than 1/5th per cent of the value of the present crop !!! The Committee has before it several urgent schemes of research, and the problem of research has gained greater importance after the separation of Pakistan from India, due to the urgent necessity of growth of long staple cotton in larger quantities from within the Dominion of India.

It is gratifying to note that in February 1949, the Government of India made a grant of Rs. 30 lakhs to the Committee. Since then a further grant of Rs. 22 lakhs has been made.

Great Benefit to Cotton Agriculturists

From a dispassionate review of the work of the Indian Central Cotton Committee, which has been highly spoken of by the Royal Commission on Agriculture in India and other competent bodies, it would not be incorrect to claim that the Central Cotton Committee has paid for itself many times over and that the gain to the cotton cultivator in the Indian Union in 1948-49 can be put down at the modest figure of Rs. 4.4 crores. In fact, the extra income obtained by the grower during one year (1948-49) alone was twice the total expenditure incurred by the Committee since its inception on cotton research to date. In 1949-50 India, as has been shown elsewhere, imported foreign cotton of the value of Rs. 64 crores. It is absolutely essential, in the interest of self-sufficiency of India, to cover the vast areas in India with improved varieties of long staple cotton, and for this purpose nothing can yield better results than promotion of cotton research for evolving better types of cotton and extending the area under improved strains within the Dominion of India.

We fervently hope that the Government of India will give their careful attention to this question of earmarking and placing at the disposal of the Central Cotton Committee funds to the extent of Rs. 25,00,000 per year for promotion of cotton research and development work.

Legislation and Central Cotton Committee's Work

By the enactment and enforcement of various legislations such as the Cotton Transport Act, the Cotton Control Act, the Cotton Ginning and Pressing Factories Act, the Indian Central Cotton Committee has endeavoured to maintain the standards of quality of cotton grown, to

prevent adulteration with inferior types and to discourage the various malpractices which at present occur in a certain number of ginning and pressing factories. All these measures have prevented great economic loss to the whole country most of which fell heavily on the grower. The Committee has also succeeded in preventing growers from being defrauded when marketing their produce by urging on the Government of Bombay to pass the Bombay Weights and Measures Act, by which weights and measures have been standardized for cotton transactions in various places. The Committee realized early that for the benefit of the cultivators it was necessary to have regulated open markets for cotton in the country, and their efforts in this direction have been crowned with success by the establishment of such markets in the States of Bombay, Madhya Pradesh, Madras, Hyderabad, Punjab and Madhya Bharat. Jointly with the Imperial Council of Agricultural Research, the Committee financed an enquiry (costing Rs. 5,22,200) into the cost of growing cotton, sugarcane and their rotation crops in the principal cotton and sugarcane tracts of India. The Committee also directed its efforts towards the ensuring of greater accuracy in cotton statistics. But above all, the Committee conducted various scientific enquiries and practical researches on the improvement of Indian cotton by the judicious hybridization of existing strains, by the naturalization of imported ones, by the eradication of undesirable ones, by the control of cotton diseases and pests and the prevention of bollweevil by the fumigation of American cotton before entry at Bombay, which incidentally is the only port from which American cotton can be imported. Most promising results have so far been obtained from these scientific investigations, and the Committee has all along been carrying on persistent propaganda to advise the grower on suitable varieties of cotton and to show him how it will give him better monetary return than short-staple cotton. Technological research essential to securing authoritative valuation of spinning qualities of cotton and to carrying out fundamental researches on the physical and chemical properties of cotton fibres is carried out at the Technological Laboratory of the Committee at Matunga (Bombay). Simultaneously, the Committee is sparing no means to popularize the use of improved varieties of Indian cotton both here and abroad and for this purpose it has been working in co-operation with the Empire Cotton Growing Corporation, the British Cotton Industry Research Association, the Lancashire Indian Cotton Committee and similar other bodies.

Under the provisions of the Cotton Control Act, the Bombay Government have assumed powers to fix in any area varieties of cotton which may be cultivated, and to prohibit the cultivation of other varieties. This Act was applied from November 1944 to the Khandesh Division where Jarilla variety is the only type allowed, and the growth of any other cotton is prohibited. The application of the Act was withdrawn from the 1950-51 sowing season.

As a result of the joint efforts of the Indian Central Cotton Committee and the Agricultural Departments, a marked change has taken

place in the character of the Indian cotton crop, particularly in the percentage of short and medium staple. The proportion of cotton of staple length 7|8" and above to the total production increased from 30 per cent in the quinquennium 1922-27 to 64 per cent in the quinquennium 1942-47.

Let us now see the average yield of cotton in India :—

India:			Yield of cotton per acre
Average	1924–27	... ...	... 92 lbs.
„	1942–46	... ...	... 112 lbs.
„	1946–47	... ...	... 114 lbs.
„	1947–48	(Union of India)	... 111 lbs.
„	1948–49	(„)	... 81 lbs.
„	1949–50	(„)	.. 94 lbs.
„	1950–51	(„)	... 94 lbs.

The average yield per acre has risen from 92 lbs. in 1924-27 to 112 lbs. in 1942-45 and in 1947-48 it was 111 lbs. Compared with other cotton growing countries, the yield per acre in India is still extremely low and is capable of very great improvement. The average acre yields in other cotton growing countries (1946) for purposes of comparison with our own are given below :—

Egypt	... ... 515 lbs.	Argentina	... ... 205 lbs.
U.S.A.	... ... 268 „	Soviet Union	... ... 297 „
Peru	... ... 434 „	Brazil	... ... 164 „
Anglo-Egyptian Sudan	... ... 314 „	Uganda	... ... 81 „
		Mexico	... ... 243 „
		INDIA	... ... 94 „

Long-stapled Cotton in India

We have already referred to the successful efforts of the Central Cotton Committee in the introduction of several improved varieties of cotton. The continuation of the war and the demand for increased quantities of stapled cotton gave a great stimulus for the spread of the better varieties. This was particularly noticeable in the Oomras tract where the new type, Jarilla had swept off practically all the inferior types and occupied a phenomenal area of over 20 lakh acres in almost record time. The area under the improved varieties in undivided India shot up from 5,663,000 acres, or 24 per cent of the total cotton acreage in 1938-39 to 8,320,000 acres or 56 per cent of the total in 1946-47.

The area under improved varieties of cotton in the Indian Union in the 1947-48 and 1948-49 seasons was 5,148,000 and 5,629,000 acres, or equivalent to 48 and 50 per cent of the total area.

In 1949-50 and 1950-51, area under improved varieties was 6,155,000 and 7,000,000 acres ; the % to total area under cotton being 50.6 and 50.5 respectively.

Consumption of Indian Cotton by Mills in India

There is a great increase in production of Indian mills and there is difficulty in obtaining Indian cotton in recent years. The consumption of Indian cotton in the cotton year ending August 1946 was 3,871,000 bales, while for the year ending August 1945, it was 4,159,000 bales, and 4,119,000 bales in 1943-44, 4,307,000 bales in 1942-43 and 4,025,000 bales in 1941-42. The consumption of Indian cotton during 1946-47 was 3,161,000 bales. For later years, *vide* Table on page 91.

The estimated consumption of Indian cotton in mills in the Indian Union in 1950-51 was 25,171,000 bales of 392 lbs. each and in 1951-52 it was 29,00,000 bales. From September 1951 to April 1952 (8 months), it was 19 lakh bales, as compared with 16 lakh bales for 8 months in the previous year.

Statistics of Stapled Cotton in India

The following table shows the different staple lengths of the cotton produced in Indian Union * during the past 10 years :—

(In '000 bales of 392 lbs.)

—	1941-42	1942-43	1943-44	1944-45	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51
Long Staple (⅞" & above) ...	657	666	818	429	413	405	318	310	492	557
Medium Staple (below ⅞" & above 11/16") ...	1,648	1,459	1,766	1,128	1,068	1,008	1,081	904	1,345	1,411
Short Staple (11/16" & below)...	2,172	1,030	1 121	665	686	755	789	553	791	958
Total ...	4,477	3,155	3,705	2,222	2,167	2,168	2,188	1,767	2,628	2,926

* Based on official estimates.

With the partition of the country in August 1947, large tracts growing mainly long and medium staple cottons fell in the territory of Pakistan, and as a result, in so far as the production of cotton of the Indian Union alone is concerned, there was a drop in the percentage of long and medium staple cottons as compared with the total crop of the Indian Union. Further, on account of re-classification of Indian cotton, which became necessary in view of the changes that had taken place in the character of the cotton crop of the country in recent years, and which was given effect to in March 1948, certain varieties of cotton which were previously included under the group ⅞" and above, have now been relegated to the group below ⅞". The production of cotton of staple length ⅞" and above was 4,92,000 bales in 1949-50, and 5,57,000 bales in 1950-51.

Imports of Raw Cotton in India

The volume and quality of imports of foreign cotton in India have been fluctuating during the last ten years. A glance at Table No. 3 in

the "Cotton Industry at a Glance" will show the trend of changes. Due to the extreme shortage of supplies of cotton within the country, large quantities of cotton were imported in India from different countries during the year ended 31st August 1951. The total quantity was 8,31,000 bales, of which 2,53,000 bales were from Egypt, 2,17,000 bales were from East Africa, 2,65,000 bales were from U.S.A. and 5,000 bales were from Pakistan. Large quantities of imports were also received during the year 1951-52, and in view of the difficulties experienced by the trade, the Government also offered a guarantee to banks to buy American and East African cotton at fixed floor prices, to facilitate financing.

The total intake of foreign cotton for eight months from September 1951 to April 1952, was 7,23,000 bales.

Duty on Imported Cotton

The present duty on imported raw cotton is 0-2-0 per lb. with a surcharge of 5 per cent.

Indo-Pakistan Agreement

In any case, it will be long before India can produce enough quantities of these finer varieties and as such it seems that for a long time India will have to depend on imported cotton from Africa and America, since Indo-Pakistan commercial relations are strained.

The estimated capacity of production of cotton in Pakistan was about 16.7 lakh bales, of which 13.8 lakh bales represent long and medium staple and 2.9 lakh bales short staple. The estimate for 1949-50 was only about 12.5 lakh bales, as compared with 8½ lakhs in 1948-49. In 1949-50 production was about 15 lakh bales of 392 lbs. each.

The following table shows the consumption of cotton—Indian and Foreign—in mills from 1941-42 to 1950-51:—

Consumption of Cotton (Indian and Foreign) in Mills in India

Period		Indian Cotton	Foreign Cotton	Total
		(Bales of 392 lbs. each)		
1941-42	...	3,869,448	566,785	4,436,233
1942-43	...	4,390,705	464,522	4,855,227
1943-44	...	4,198,306	633,671	4,831,977
1944-45	...	4,244,774	643,222	4,887,998
1945-46	...	3,958,524	604,650	4,563,174
1946-47	...	3,161,507	695,981	3,857,488
1947-48	...	2,863,450	1,347,432	4,210,882
1948-49	...	3,123,915	1,130,721	4,254,636
1949-50	...	2,544,174	1,140,711	3,684,885
1950-51	...	2,516,963	1,105,125	3,622,088
1951-52	...	2,900,000	1,100,000	4,000,000

N.B.—Figures upto 1946-47 relate to Undivided India. From 1947-48 Pakistan Cotton is included under Foreign Cotton.

Cotton Exports from India—Restriction of Export from 1948

We give below a table showing the number of bales of cotton exported out of India from 1938-39 to 1950-51:

(In thousands of bales)

1938–39	3,274
1939–40	2,340
1940–41	2,013
1941–42	873
1942–43	160
1943–44	383
1944–45	409
1945–46	1,038
1946–47	1,005
1947–48* (Indian Union)	800
1948–49 („)	305
1949–50 („)	235
1950–51 („)	175

At present cotton exports are permitted by Government on the basis of export quotas issued from time to time.

We would invite attention to Table No. 4 in "At a Glance".

Fixation of Floor and Ceiling Prices of Indian Cotton since 1948

In August 1948, the Government of India decided to control the prices of raw cotton. They fixed the floor price of 1948-49 Jarilla of 25/32″ staple at Rs. 495, and ceiling at Rs. 620 per candy. The Government of India also announced their intention on 1st September 1948 of purchasing cotton at the floor prices in the interest of cotton growers. This position continued during the 1949-50 season also, when the mills had to pay a premium of about Rs. 150 per candy over the official ceiling prices. The Government, however, refused to recognise the actual prices paid by the mills. The cultivators, who were encouraged by this premium, increased the cotton acreage from 11.3 million during 1948-49 to 12.2 million acres in 1949-50. There was also a corresponding increase in the yield, from 17.7 lakh bales to 26.3 lakh bales.

In August 1950, the Government of India announced an increase in the basic ceiling price by Rs. 150 per candy, that is, Rs. 770 per candy for Jarilla 25/32″ staple, for 1950-51. This increase in prices again led to expansion of the cotton acreage to 13.9 million acres in 1950-51, but the enforcement of the ceiling prices by means of monopoly purchase through Government nominees partly frustrated the expectations of the cultivator, of again circumventing control measures during the 1950-51 season. Nevertheless, mills were often in the necessity of paying about Rs. 50 per candy over the official ceiling prices. With a view to augment the country's cotton supplies, the basic price for the 1951-52 season was

fixed at Rs. 50 per candy higher than for the 1950-51 crop, that is, at Rs. 820 per candy for Jarilla 25/32″ staple. At the same time, special empahsis was laid on quality control measures to be enforced with the help of sworn surveyors of the East India Cotton Association. The estimate for production of cotton during the 1951-52 season is in the vicinity of 36 lakh bales.

Early, in 1952, there was a tremendous fall in prices of cotton, both foreign and Indian, and this led to relaxation by the Government on distribution and movement control, guarantee of purchase of cotton at floor prices, liberalisation of exports of short staple varieties, and a reduction in the export duty from Rs. 400 to Rs. 200 per bale, from 15th March 1952.

The Cotton Advisory Board of the Textile Commissioner, Bombay, at its meeting held on the 26th May 1952, considered this matter and passed the following resolution :

> "Whereas the prices of Indian cotton registered a sharp decline during the past few months ;
>
> Whereas the prices of varieties for which no floors were fixed for 1951-52 fell far more steeply than others ;
>
> Whereas the basic floor prices remained unchanged since 1949-50, despite the increase of basic ceiling prices, and are, as such, inequitable to the grower ;
>
> Whereas at the existing prices, the Indian cotton is the cheapest of all cottons of similar quality grown elsewhere ;
>
> Whereas the cotton farmer is now actively engaged in planning his sowings for the 1952-53 season ; and
>
> Whereas the low cotton prices prevailing at present and the inadequate floor prices will discourage the farmer from growing cotton ;
>
> the Cotton Advisory Board strongly recommends that the Government of India should declare its cotton policy for 1952-53 without delay. The Board further recommends that the Government policy for 1952-53 season should provide *inter alia* for the following :
>
> (i) maintenance of *status quo* in respect of the basic ceiling prices of different varieties together with the attendant 'on' and 'off' allowances ; and
>
> (ii) increasing the floor prices fixed for the 1951-52 season by Rs. 100 per candy."

The cultivation of cotton, even with the suggested increase of Rs. 100 per candy in the floor prices to be fixed for the 1952-53 season, was considered to be less remunerative than that of competing crops of groundnut and jowar.

The Government of India announced their decision on 1st July 1952, to raise the floor prices for Indian varieties of cotton for the 1952-53 crop by Rs. 55 per candy over the 1951-52 prices. This was considered

satisfactory by the trade. The following press note gives the revised prices for the 1952-53 crop :

Press Note

Bombay, 1-7-1952.

The Government of India have decided to raise the floor prices for Indian varieties of cotton for the 1952-53 crop as follows :—

Varieties		Existing Floor Prices Rs.	Floor Prices applicable for 1952-53 crop Rs.
Jarilla	...	495	550
Vijay	...	565	620
Surat	...	655	710
P/Am 4F R G.	...	525	580
P/Am 4F S. G.	...	545	600
P/Am L. S. S. R. G.	...	585	640
P/Am L. S S. S. G.	...	605	660
P/Am 289F R. G.	...	675	730
P/Am 289F S. G.	...	705	760
Compta	...	645	700
Western	...	555	610
Upland	...	575	630
Cambodia	...	675	730
Karunganni	...	575	630
Buri American	...	625	680
Parbhani American	...	625	680
Gaorani 6 and 12	...	625	680
Jayadhar	...	645	700
Kalyan	...	510	565

Note : Floor prices of other varieties, like Bengal Deshi which were principally exported, were not fixed.

Ceiling Prices were not changed

At its July 1952 meeting, the Indian Central Cotton Committee urged the Government to fix floor prices for these other varieties also.

Till the 15th July 1952, no announcement was made by the Government of India regarding the cotton policy for the 1952-53 season. The ceiling prices were maintained as in the 1951-52 season.

We give below a table indicating the floor and ceiling prices in rupees per candy for two important varieties of Indian cotton in 1951-52, and the landed prices of equivalent Middling U.S.A. cotton respectively.

Indian Cotton Prices, 1951-52, under Cotton Control Order

(Rs. per candy of 784 lbs. each)

—	7/8" Staple		15/16" Staple	
	Floor	Ceiling	Floor	Ceiling
Surat Fine	655	1,020	700	1,065
Cambodia Fine	675	1,045	740	1,110

U.S.A. Cotton Prices (current spot and loan level for Middling 15/16")

Spot price in U.S.A.		Bombay delivery	Loan level (floor price) in U.S.A.		Bombay delivery
Per lb. Cents	Per candy Rs.	Per candy Rs.	Per lb. Cents	Per candy Rs.	Per candy Rs.
38 90*	1,462	1,780	32.00	1,200	1,525

* Price towards the end of May 1952.

It will be evident that any short production of 7/8" and 15/16" Indian cotton costing, at maximum prices, Rs. 1,000 to Rs. 1,100 per candy will have to be made good by imported equivalent U.S.A. cotton at prices ranging from Rs. 1,525 to Rs. 1,780 per candy Bombay delivery.

Government Scheme for Purchase of Cotton of the 1951-52 Season at Floor Prices

We are glad to note that the Government of India have now evolved a concrete scheme for the purchase of cotton at floor prices, in the event of such a necessity arising. They have also appointed the following firms as buying agents to buy such cotton on behalf of Government:

1. Messrs. H. M. Mehta & Co.,
2. „ Kilachand Devchand & Co., Ltd.,
3. „ Ramnarain Sons, Ltd.,
4. „ Narandas Rajaram & Co., Ltd.,
5. „ Patel Cotton Co., Ltd.,
6. „ Bhaidas Cursondas & Co.,
7. „ Podar Trading Co., Ltd.,
8. „ Khimji Visram & Sons,
9. „ Breul & Co.,
10. „ C. Parakh & Co. (India) Ltd.,
11. „ Rallis India Ltd.,
12. „ Volkart Bros.,
13. „ Gill & Co. Ltd.,
14. „ Chimanlal Premchand,
15. „ Chunilal Pranjivandas & Co.,
16. „ Bombay Co. Ltd.,
17. „ Arjan Khimji & Co.,
18. „ Drennan & Co.

The buying agents will buy Indian cotton throughout India except the State of Jammu and Kashmir.

Cotton Policy for 1952-53

The carry-over of cotton with Indian mills on 1st September 1951, was 18 lakh bales, and the estimated carry-over with mills on 31st August 1952, is about 26 lakh bales. This is the highest balance since the beginning of the war. While the increase in the floor prices by Rs. 55 is not adequate, it is felt that it will act as an inducement to the farmer to continue to grow cotton instead of other crops, and it will be possible to reach the target of 40 lakh bales during the next season.

Mill Consumption of Indian Cotton from 1931 to 1951

The table below shows the percentage of Indian cotton consumed by mills during the past 20 years :—

Year	Quantity of Indian Cotton Consumed by Mills (In 000 bales of 400 lbs.)	Percentage to total Crop of Cotton in India	Total Quantity of Cotton Consumed by Mills in India (In 000 bales of 400 lbs. each)
1931–32 ...	2,346	58 6	2,911
1932–33 ...	2,361	51.1	2,837
1933–34 ...	2,336	46 2	2,704
1934–35 ...	2,612	54 5	3,123
1935–36 ...	2,678	45.6	3,181
1936 37 ...	2,633	42.2	3,147
1937–38 ...	3,000	52 4	3,663
1938–39 ...	3,151	62 4	3,811
1939–40 ...	3,050	62.1	3,680
1940–41 ...	3,617	59.5	4,251
1941–42 ...	3,869	62 2	4,436
1942–43 ...	4,391	93.4	4,855
1943–44 ...	4,198	80 0	4,832
1944–45 ...	4,245	(a)	4,888
1945–46 ...	3,959	(a)	4,563
1946–47† ...	2,145	98.0	3,857
1947–48† ...	2,863	(a)	4,211
1948–49† ...	3,124	(a)	4,255
1949–50† ...	2,544	96.8	3,685
1950–51† ...	2,517	86.0	3,622

† Relates to Indian Union only.
(a) Consumption in excess of the year's production.

Cotton Futures Trading

The East India Cotton Association almost decided in July 1952, to resume trading in cotton futures. It is likely that Government will permit it, if crop prospects are good. But this decision will not come earlier than September 1952.

Self-sufficiency of Raw Cotton essential for the Union of India

We now propose to discuss the possibilities and methods of replacement of the quality and quantity of raw cotton as a result of the exclu-

sion of the Dominion of Pakistan which was a very important unit in the total production of cotton. Of the all-India production of cotton in 1950-51, namely, 29,26,000 bales, the long and medium staple constituted 17,60,000 bales or nearly 60 per cent, *vide* Table on page 90. A much higher production of such cotton is still necessary, as our annual requirement is placed at 14 lakh bales. The target fixed by the Planning Commission to be achieved in 1955-56, is 45 lakh bales.

Our target in respect of production of raw cotton can be aimed at (1) replacement of the quantity lost by the exclusion of Pakistan, or (2) production of suitable quantity for keeping our mills engaged to their maximum capacity, or (3) production of a still larger quantity which will be required for supplying the minimum clothing necessary for the total population of the Indian Dominion according to international standards. For the short-range programme we can concern ourselves with the first objective as the latter two objectives are in a sense idealistic and may well be aimed at as part of the long-range programme before the country. Our immediate short-term programme would, therefore, be a replenishment of the loss of cotton which was available so far from Pakistan as we cannot depend on supplies from Pakistan.

The short-term policy can be implemented by three or four methods. An easy method which would naturally strike one is an increase in the area under cultivation from 14 lakh acres to about 17 lakh acres, but in doing so there would be serious difficulties in encroaching upon land under food-crops, in view of the pressing food requirements of the country. We would, suggest, therefore, that the first practicable method of relieving the situation is to undertake an *intensive* cultivation of the areas already under cotton.

The Cotton Extension Scheme sponsored by the Government of India should achieve good results in securing larger production, particularly after completion of the major irrigation projects now under construction in the Punjab, Madras, Hyderabad, etc., by making available a larger area for cotton under irrigation, and also by intensive cultivation.

Looking at the average acre yield of India and comparing it with the yields in other progressive countries, one cannot but be struck by the huge scope that this method offers for immediate achievement of the ideal of higher production by proper manuring and judicious adjustment of cultivation practices. While the average yield per acre in India is only about 111 lbs., the yield in U.S.A. is 266 lbs., in Egypt 313 lbs., in the Soviet Union 322 lbs. per acre. There are vast technological possibilities of improvement in yield and quality, which should be explored immediately. Supply of irrigation and manure would be useful, and should be looked into with urgency.

The second method is by the *extension of cotton cultivation to areas on the mountain slopes and valleys*, where several varieties, especially long stapled perennials, could be cultivated as plantation crops.

The third method is the *introduction of cotton as a rotation crop in paddy lands*, thus utilising the land which would otherwise lie fallow after harvest of paddy, while the fourth is the *replacement of the existing short staple variety by superior quality strain where such types are already evolved*.

All the four methods by which our ideal of immediately supplanting the production of Pakistan cotton could be attained have to be translated into a direct plan of working.

If the goal of production of the entire requirement of cloth of the people from within the country is accepted, it would be necessary to retain a larger portion of even our short staple cotton, and with a view to providing all Indian Mills and the hand-spinning industry with the necessary raw material, it would even be necessary to ban export of cotton which is capable of spinning 15s and over. Such restriction on the raw cotton export would be essential for ensuring that the raw material position of the textile industry is not jeopardized.

If the indigenous raw cotton is thus conserved it would mean a definite encouragement to the hand-spinning industry, which would be welcome, for this would afford a solution to the problem of unemployment and under-employment of millions of agriculturists in the country, who would be provided with a part-time occupation from which they could supplement their meagre income. Mahatma Gandhi laid great stress on encouragement on hand-spinning, and the utilisation of the short staple cotton crop in adjacent areas for hand-spinning purposes.

Fresh Study of the Problem of Raw Cotton in the Indian Union needed

We therefore suggest that the problem of production of raw cotton in the country should be studied in an expert manner, in relation to the needs not only of the cotton textile industry but also of the hand-spinning industry, which is a vital and well spread cottage industry in the village economy of the country with potentiality of further development, in the present world conditions of insecurity and shortage of raw cotton, and on the basis of the data available suitable steps should be taken for production of such quality of raw cotton *as could be processed within the country*.

In view of the great shortage of cotton, India had to import long staple cotton from foreign countries to the extent of 11½ lakh bales in 1950-51. We hope that the Government of India will concentrate their efforts on translating to the cultivators' fields the technical potentialities of improvement in respect of the yield per acre and the quality, in order to ensure that India has plentiful supplies of suitable qualities of cotton for her needs. We also suggest that the campaign for cultivation of better quality cotton in the country should be intensified, and suitable premia should be fixed therefor, in order to reduce to the minimum imports of long staple cotton.

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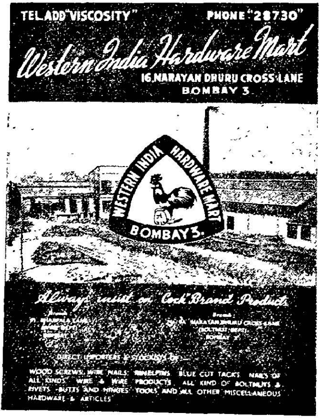

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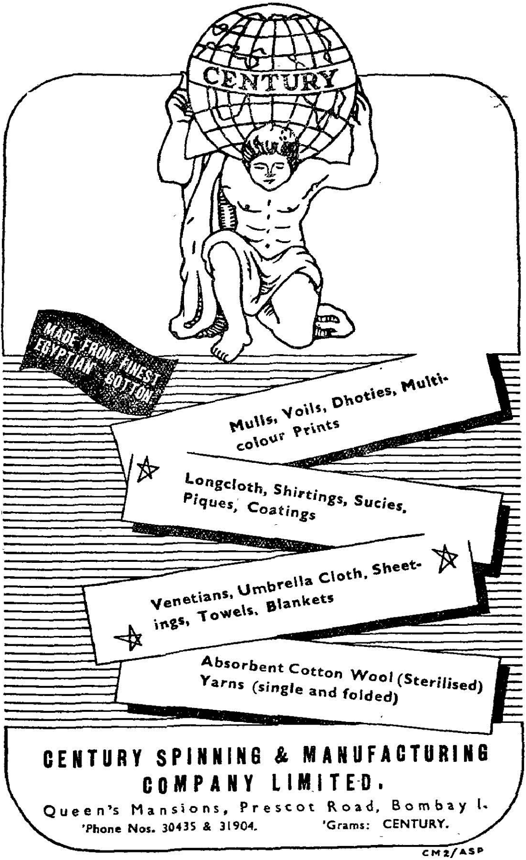

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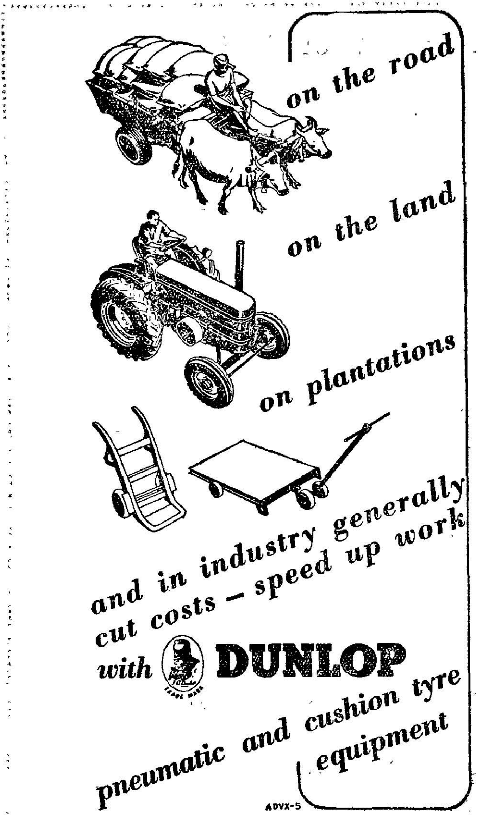
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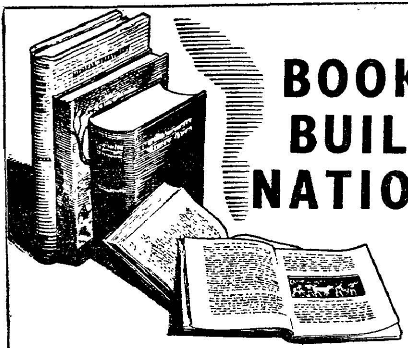

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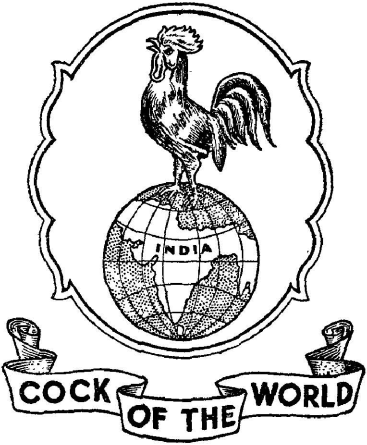

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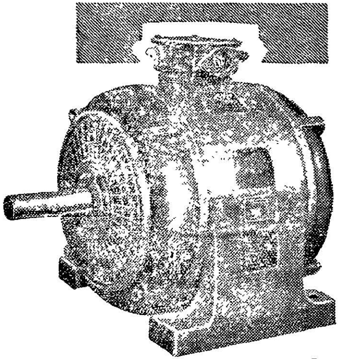

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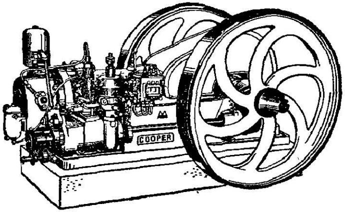

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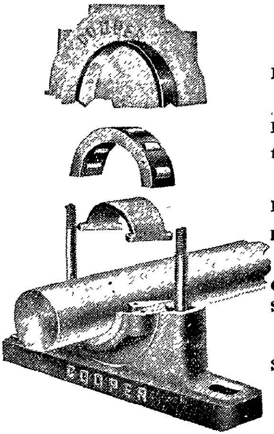

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APPENDIX I TO THE ANNUAL FOR 1951-52

LIST OF COTTON TEXTILE MILLS IN THE UNION OF INDIA, & IN PAKISTAN

Working as well as Projected, 1951

With Looms, Spindles, Cotton Consumed, Average Number of Hands Employed Daily, During the year ended 31st August 1951

MILLS IN THE CITY & ISLAND OF BOMBAY, MILLS IN AHMEDABAD, OTHER MILLS IN BOMBAY STATE, MILLS IN OTHER STATES, MILLS IN COURSE OF ERECTION.

Thoroughly Revised and brought up-to-date.

Publishers : **M. P. GANDHI & CO. (Publishers),**
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Telephones : Office : 24047
Res. : 43926

June, 1952.

COTTON MILLS IN THE CITY AND ISLAND OF BOMBAY

[*N.B.*—Figures in italics denote Mules]

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
1. Apollo Mills, Ltd., DeLisle Road, Chinchpoogly	Messrs. The Rajputana Textiles (Agencies), Ltd., Agents, Office on Mill premises.	45,500	40,244	898	867	9,198	1,408
2. Beharilal Ramcharan Cotton Mills, Ltd., Ferguson Road, Lower Parel.	Messrs. B. R. Sons, Ltd., Agents, Empire House, Hornby Road, Bombay.	50,336	47,636	1,021	979	5,846	1,314
3. Bombay Dyeing and Mfg. Co., Ltd. (Spring Mills), Naigaum Road, Dadar.	Messrs. Nowrosjee Wadia & Sons, Ltd., Agents, Neville House, Graham Road, Ballard Estate, Bombay.	1,10,136	1,07,698	3,224	3,182	12,156	3,476
4. Bombay Dyeing and Mfg. Co., Ltd. (Textile Mills), Elphinstone Road, Parel.	do.	71,936	68,849	1,631	1,586	13,993	2,804
5. Bradbury Mills, Ltd., Ripon Road, Jacob Circle	Messrs. Ramnarain Sons, Ltd., Agents, Imperial Bank Annexe, Bank Street, Fort, Bombay.	38,208	34,565	860	823	5.656	1,259
6. Century Spinning and Manufacturing Co., Ltd., (Century Mill), Junction of DeLisle Road and Elphinstone Road.	Managed by Board of Directors, Queen's Mansions, Prescott Road, Fort, Bombay.	1,09,320	1,01,667	2,685	2,587	14,024	5,193
7. Century Spinning and Manufacturing Co., Ltd., (Zenith Mill), Junction of DeLisle Road and Elphinstone Road.	do.						
8. Colaba Land and Mill Company, Ltd. (Old Mill), Victoria Bunder, Colaba.	Managed by Board of Directors, Office on Mill premises.	39,408	36,249	698	689	5,319	1,512
9. Colaba Land and Mill Company, Ltd., Jehangir Wadia Mill, Victoria Bunder, Colaba.	do.						

10.	Coorla Spinning and Weaving Company, Ltd., Kurla.	Messrs. Cowasjee Jehangir & Co., Ltd., Secretaries, Treasurers and Agents Readymoney Mansion, Veer Nariman Road, Fort, Bombay.	27,308	25,446	680	666	5,247	1,459
11.	Crown Spinning and Manufacturing Co., Ltd. (formerly Dhun Mills), Gokhale Road, Parel (South).	Messrs Purshotam Vithaldas & Co., Secretaries, Treasurers and Agents, Sir Vithaldas Chambers, Apollo St., Fort, Bombay.	56,500	51,817	1,076	1,041	6,439	1,634
12.	Dawn Mills Company, Ltd., Ferguson Road, Lower Parel.	Messrs. Ramnarain Sons, Ltd., Agents, Imperial Bank Annexe, Bank Street, Fort, Bombay.	36,984 *5,220*	29,580	...	...	3,237	955
13.	Dhanraj Mills, Ltd. (formerly Assur Virji Mills, Ltd), Sun Mill Road, Lower Parel.	Messrs. Ramgopal Ganpatrai & Sons, Ltd., Managing Agents, Office on Mill premises	34,932 *1,384*	33,436	786	775	4,944	1,262
14.	Digvijay Spinning and Weaving Co., Ltd. (formerly Dinshaw Petit Mills), Lal Baug, Parel.	Messrs. Jethabhai Khatau & Co. (Agencies), Ltd., Agents, Office on Mill premises	45,192	42,131	1,177	1,006	5,729	1,515
15.	Edward Textiles Ltd (formerly Edward Sassoon Mills Ltd.), Ferguson Road, Lower Parel.	Messrs. Puranmal Radhakishan & Co., Agents, Indu House, 15 Dougall Road, Ballard Estate, Fort, Bombay	37,516 *12,780*	41,356	928	863	9,641	1,480
16.	Elphinstone Spinning and Weaving Mills Co., Ltd, Elphinstone Road, Parel.	Messrs. Chidambaram Mulraj & Co., Ltd., Agents, Kamani Chambers, 32 Nicol Road, Ballard Estate, Bombay.	38,172 *5,568*	36,008	887	858	7,365	1,494
17.	Finlay Mills, Ltd., Government Gate Road, Parel.	Messrs. James Finlay & Co., Ltd., Agents, Chartered Bank Bldgs., Fort, Bombay.	46,072	43,236	784	773	5,109	1,903
18.	Gold Mohur Mills, Ltd., Dadar Main Road	do.	40,540	34,577	1,020	1,006	4,896	1,533
19. / 20.	Hind Mills Ltd. (formerly David Mills Co., Ltd.) (Mill No. 1), Carroll Road, Parel. / Hind Mills Ltd. (formerly David Mills Co., Ltd.) (Mill No 2), Carroll Road, Parel.	Messrs. Hind Agents, Ltd., Mg Agents, Indu House, 15 Dougall Road. Ballard Estate, Fort, Bombay. / do.	62,408 *11,776*	60,556	1,227	1,157	12,122	1,942
21.	Hindoostan Spinning and Weaving Mills Co., Ltd., Ripon Road, Jacob Circle.	Messrs. Thackersey Mooljee & Co., Agents, Sir Vithal Chambers, Apollo Street, Fort, Bombay.	45,332	43,390	1,216	1,174	7,818	1,583
22.	Hirjee Mills, Ltd. (formerly Presidency Mills Co., Ltd.), Ferguson Road, Lower Parel.	Messrs. J. R. Bhadani & Co., Ltd., Agents, Office on Mill premises.	48,012	43,398	884	822	6,312	1,728
23.	Indian Manufacturing Co., Ltd., Lamington Road North, Jacob Circle.	Messrs. Damodar Thackersey Mooljee & Co., Agents, Sir Vithaldas Chambers, Apollo Street, Fort, Bombay.	49,580	45,863	1,119	1,104	7,432	1,836

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
24.	India United Mills, Ltd., No. 1 Mill (formerly Jacob Mill), Suparibaug Road, Parel.	Messrs. Agarwal & Co., Agents, Indu House, Dougall Road, Ballard Estate, Fort, Bombay.	90,600 *6,160*	88,548	2,228	2,162	15,987	3,165
25.	India United Mills, Ltd., No. 2 Mill (formerly Alexandria Mill), Gorupdeo Road, Chinchpoogly.	do.	35,880	33,299	742	715	19,815 (Nos. 25 and 26)	1,626
26.	India United Mills, Ltd., No. 3 Mill (formerly E.D. Mill), Gorupdeo Road, Chinchpoogly.	do.	71,060 *5,390*	65,236	752	740		1,168
27.	India United Mills, Ltd., No. 4 Mill (formerly Rachel Mill), Chinchpoogly Road.	do.	...	...	1,872	1,747	...	1,240
28.	India United Mills, Ltd., No. 5 Mill (formerly Manchester Mill), Chinchpoogly-Cross Lane, Kalachowki.	do.	28,940	26,334	684	646	4,822	758
29.	Jam Manufacturing Co, Ltd., Mill No. 1, Lalbaug, Parel.	Messrs. Tricumdas Vandravan & Co., Treasurers, Agents, and Secretaries, Lalbaug, Parel, Bombay.	30,940	28,427	910	893	3,847	1,172
30.	Jam Manufacturing Co, Ltd, Mill No 2 (formerly Birla Mills, Ltd., No. 2), Sewri Road.	do.	23,176	21,083	574	565	1,786	952
31.	Jubilee Mills, Ltd., Tokasey Jivraj Road, Sewri.	Messrs. Chamanlal Mehta & Co., Ltd., Secretaries, Treasurers and Agents, Neptune Bldg., Apollo Street, Fort, Bombay.	38,280	31,982	680	680	4,167	1,109
32.	Kamala Mills, Ltd. (formerly Ebrahimbhoy Pabaney Mills), Tulsi Pipe Line Road, off DeLisle Road.	Managed by Board of Directors, Kilachand Devchand Building, 45/47 Apollo Street, Fort, Bombay.	39,744	37,890	1,055	1,034	8,060	2,303
33.	Khatau Makanji Spinning and Weaving Co., Ltd., Haines Road, Byculla.	Messrs. Khatau Makanji & Co., Ltd., Agents, Laxmi Buildings, 2B, Ballard Pier, Fort, Bombay.	77,404	74,540	1,517	1,382	6,220	2,808

34.	Kohinoor Mills Co., Ltd. (Nos. 1 & 2 Mills), Naigaum Cross Road, Dadar.	Messrs. Killick Industries, Ltd., Agents, Killick Bldg., Home Street, Fort, Bombay.	1,11,464	1,06,531	1,552	1,532	20,767	4,545
35.	Kohinoor Mills Co., Ltd. (No. 3 Mill), Lady Jamshedji Road, Dadar.	do.	...	...	294	285	...	894
36.	Modern Mills, Ltd., Mill No. 1 (formerly Mysore Spinning Manufacturing Co., Ltd., Mill No. 2), Elphinstone Road, Parel.	Messrs. N. Sirur & Co., Ltd., Agents, 70 Forbes Street, Fort, Bombay.	19,172 *4,960*	22,513	...	...	8,751	609
37.	Modern Mills, Ltd., Mill No. 2 (formerly Bomanji Petit Mills), Mahaluxmi.	do.	19,944	17,640	644	576		729
38.	Moon Mills, Ltd., New Sewree Road ...	Messrs. Asiatic Textile Co., Ltd., Agents, 70, General Assurance Building, Hornby Road, Fort, Bombay.	...	...	875	...	...	...
39.	Morarjee Goculdas Spinning and Weaving Co., Ltd., Suparibaug Road, Parel.	Messrs. Piramal Gangadhar, Agents, Office on Mill premises.	60,652	53,377	1,650	1,374	12,049	3,410
40.	New China Mills, Ltd. (formerly China Mill), Sewree.	Mr. Navinchandra Mafatlal, Managing Director, 29, Veer Nariman Road, Fort, Bombay.	42,792	40,074	759	759	4,365	1,476
41.	New City of Bombay Manufacturing Co , Ltd., 63, Chinchpokli Road, Parel.	Messrs. W. H. Brady & Co., Ltd., Agents, Royal Insurance Building, 12/14, Veer Nariman Road, Fort, Bombay.	45,944	42,915	432	421	5,511	1,385
42.	New Great Eastern Spinning and Weaving Co., Ltd., Victoria Gardens Road, Chinchpoogly.	do.	32,364 *14,520*	44,393	1,018	966	8,155	1,935
43.	New Kaiser-i-Hind Spinning & Weaving Co., Ltd , Gorupdeo Road, Chinchpoogly.	Lala Kailashpat Singhania, Mg. Director, J. K. Building, Dougall Road, Ballard Estate, Bombay.	54,052	47,882	1,262	1,003	8,052	1,866
44.	New Pralhad Mills, Ltd. (formerly Pralhad Mills), Ferguson Road, Lower Parel.	Messrs. Amrit Banaspati Co., Ltd., Agents, East & West Building, Apollo Street, Fort, Bombay.	40,848	39,305	1,003	961	8,020	1,903
45.	New Union Mills, Ltd. (formerly Union Mills), DeLisle Road, Lower Parel.	Messrs. Mafatlal Chandulal & Co. (Bombay), Ltd., Mg. Agents, 127 Mahatma Gandhi Road, Fort, Bombay.	33,720	32,786	873	863	8,968	1,494
46.	Phoenix Mills, Ltd. (formerly Britannia Mills), Tulsi Pipe Line Road, Lower Parel.	Messrs Ramnarain Sons, Ltd., Agents, Imperial Bank Annexe, Bank Street, Fort, Bombay	48,128	44,350	1,160	855	7,149	1,703
47	Podar Mills, Ltd. (formerly Toyo Podar Cotton Mills, Ltd.), DeLisle Road.	Messrs. Podar Sons, Ltd., Managing Agents, Podar Chambers, Parsee Bazar Street, Fort, Bombay.	32,600	31,344	930	893	9,497	1,078

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
48.	Prakash Cotton Mills, Ltd. (formerly Seksaria Cotton Mill No. 2), DeLisle Road.	Messrs Seksaria Industries, Ltd., Seksaria Chambers, 139 Medows Street, Fort, Bombay	26,024	21,325	470	411	6,588	1,383
49	Raghuvanshi Mills, Ltd. (formerly Kilachand Mills. Ltd.), 11-12, Haines Road, Mahaluxmi.	Messrs. Ravindra Maganlal & Co., Ltd , Agents, Office on Mill premises.	33,160	30,703	156	129	8,444	1,184
50	Ruby Mills, Ltd., (formerly Sorab Mills), Woollen Mill Gully, Lady Jamshedji Road, Dadar.	Messrs. Choonilal Jeevandas & Co , Agents, 49-55, Apollo Street, Fort, Bombay.	19,464	14,604	430	391	2,435	789
51.	Sassoon Spinning and Weaving Co., Ltd , Mount Estate, Ghorupdeo, Mazagon.	Messrs. M G. Investment Corporation, Ltd., Agents, 127, Mahatma Gandhi Road, Fort, Bombay.	58,016 *2,224*	55,308	1,254	1,236	16,395	2,409
52.	Seksaria Cotton Mills, Ltd., Mill Nos. 1 & 1A (formerly Currimbhoy and Mohamedbhoy Mills), Tulsi Pipe Line Road, DeLisle Road.	Messrs. Seksaria Sons, Ltd., Agents, 139 Medows Street, Fort, Bombay	72,796	67,511	1,098	1,042	10,522	2,480
53.	Shree Madhav Mills (formerly Madhowji Dharamsi Manufacturing Co., Ltd.), Foras Road, Bombay 8.	Messrs. Puranmal Radhakishan & Co , Agents, Indu House, Dougall Road, Ballard Estate, Bombay	39,112	32,943	838	789	5,370	1,443
54.	Shree Madhusudan Mills (formerly Madhusudan Mills, Ltd.), DeLisle Road.	Messrs. Hall & Anderson, Ltd., Janmabhoomi Chambers, Fort Street, Ballard Estate, Fort, Bombay.	61,400	55,273	1,742	1,467	11,544	2,611
55.	Shree Niwas Cotton Mills, Ltd. (formerly Fazulbhoy Mills, Ltd.), DeLisle Road.	Messrs. The Marwar Textiles (Agency), Ltd., Agents, Shreenivas House, Waudby Road, Fort, Bombay.	66,472	50,324	1,640	1,603	9,483	2,900
56.	Shree Ram Mills, Ltd. (formerly Crescent Mills, Ltd.), Ferguson Road, Worli, Lower Parel.	Messrs. Bhogilal Menghraj & Co., Ltd., Agents, Office on Mill premises.	64,140	58,685	950	935	5,016	1,957
57.	Shree Sitaram Mills, Ltd. (formerly Sir Shapurji Broacha Mills, Ltd.), DeLisle Road, Chinchpoogly.	Messrs. More & Co., Ltd., Mg. Agents, 15A, Elphinstone Circle, Fort, Bombay.	65,528 *1,872*	55,212	1,012	987	7,781	2,309
58.	Shree Sitaram Mills, Ltd. (New Empress Mill), DeLisle Road, Chinchpoogly.	do.						

59.	Simplex Mills Co., Ltd., Clerk Road, Jacob Circle, Byculla.	Messrs. Forbes, Forbes Campbell & Co., Ltd., Agents, Forbes Building, Home Street, Fort, Bombay.	35,520 *936*	25,491	1,276	1,059	8,864	2,148
60.	Standard Mills Co., Ltd., Parbhadevi Road, Lower Parel.	Messrs. Mafatlal Gagalbhai & Sons, Agents, Rustom Building, 29 Veer Nariman Road, Fort, Bombay.	53,892	50,374	1,633	1,601	6,422	2,346
61.	Svadeshi Mills Co., Ltd., Kurla	Messrs. Tata Industries, Ltd., Mg. Agents, Bombay House, 24 Bruce Street, Fort, Bombay.	65,040	58,765	2,000	1,862	10,729	3,166
62.	Swan Mills, Ltd., New Sewri Road	Messrs James Finlay & Co., Ltd., Agents, Chartered Bank Buildings, Fort, Bombay.	35,804	34,294	552	548	6,850	1,214
63.	Tata Mills, Ltd., Dadar Road, Parel ...	Messrs. Tata Industries, Ltd., Mg. Agents, Bombay House, 24 Bruce Street, Fort, Bombay.	63,248	59,377	1,800	1,621	12,530	3,331
64.	Victoria Mills, Ltd. (Old Satya Mill), Globe Mill Lane, off DeLisle Road.	Messrs. Mangaldas Mehta & Co., Ltd., Secretaries, Treasurers and Agents, Neptune Building, Apollo Street, Fort, Bombay.	50,152	46,834	958	940	6,956	1,632
65.	Western India Spinning and Manufacturing Co., Ltd., Kalachowki Road, Chinchpoogly.	Messrs. Thackersey Mooljee Sons & Co., Agents, Sir Vithaldas Chambers, Apollo Street, Fort, Bombay.	45,508	40,403	1,308	1,243	8,423	1,853
	(All these are in Bombay City.)	Total ..	28,66,372 *72,790*	26,55,637	65,384	60,874	4,62,823	1,11,773

COTTON MILLS IN AHMEDABAD

1.	Ahmedabad Advance Mills, Ltd., Shahibag Road, Outside Delhi Gate, Ahmedabad.	Messrs. Tata Industries, Ltd., Mg. Agents, Bombay House, 24 Bruce Street, Fort, Bombay.	44,224	39,529	1,016	942	8,476	1,721
2.	Ahmedabad Cotton Manufacturing Co., Ltd. (Bagicha Mill), Outside Sarangpur Gate, Ahmedabad.	Messrs. Amritlal Hargovandas & Bros., Ltd, Agents, Office on Mill premises	22,900	22,900	509	500	2,734	850
3.	Ahmedabad Jaya Bharat Cotton Mills, Ltd. (formerly Bharat Laxmi Cotton Mills, Ltd.), Beyond Kankaria Railway Siding, Mithipur, Ahmedabad.	Messrs. Parakh Fabrics, Ltd., Mg. Agents, 28 Apollo Street, Fort, Bombay.	35,824	29,992	686	642	3,841	1,437

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
4.	Ahmedabad Jupiter Spg., Wvg. and Mfg. Co., Ltd., Dudheshwar Road, Ahmedabad.	Messrs. M. Parakh & Co., Ltd., Agents, 28 Apollo Street, Bombay.	29,508	28,601	667	664	3,900	1,416
5.	Ahmedabad Kaiser-i-Hind Mills Co., Ltd. (formerly Ahmedabad Merchants' Spinning Mills Co., Ltd.), Outside Raipur Gate, Ahmedabad.	Messrs. Ramanlal Kanaiyalal & Co., Ltd., Mg. Agents, Office on Mill premises.	20,392	19,966	432	426	3,615	750
6.	Ahmedabad Laxmi Cotton Mills Co., Ltd., Outside Raipur Gate, Ahmedabad.	Messrs. Hariprasad Jayantilal & Co., Ltd., Agents, Post Box No. 42, Ahmedabad.	26,924	26,872	592	566	5,761	1,109
7.	Ahmedabad Manufacturing and Calico Printing Co., Ltd. (Calico Mills), Outside Jamalpur Gate, Ahmedabad.	Messrs. Karamchand Premchand, Ltd., Agents, Post Box No. 12, Ahmedabad.	1,37,056	1,28,062	2,370	2,322	15,061	4,652
8.	Ahmedabad Manufacturing and Calico Printing Co., Ltd (Jubilee Mills), Outside Dariapur Gate, Ahmedabad.	do.						
9.	Ahmedabad New Cotton Mills Co., Ltd., Near Kokhra Mehemedabad, Ahmedabad.	Messrs. Narottam Chandulal & Co., Ltd., Agents, Office on Mill premises.	20,116	19,425	448	446	3,720	772
10.	Ahmedabad New Textile Mills Co., Ltd., No. 1, Outside Raipur Gate, Ahmedabad.	Messrs. Narayanlal Jivanlal & Co., Ltd., Agents, Office on Mill premises.	29,508	25,755	902	902	1,151	1,365
11.	Ahmedabad New Textile Mills Co., Ltd., No. 2 (formerly Javeri Spg. & Mfg. Co., Ltd.), Outside Raipur Gate, Ahmedabad.	do.						
12.	Ahmedabad Sarangpur Mills Co., Ltd., Outside Raipur Gate, Ahmedabad.	Messrs. Himatlal Motilal & Co., Ltd., Agents, Office on Mill premises.	30,928	28,731	590	541	4,144	1,088
13.	Ahmedabad Shri Ramkrishna Mills Co., Ltd., Gomtipur Road, Ahmedabad.	Messrs. Chimanlal Manecklal & Co., Ltd., Agents, Office on Mill premises.	28,672	27,853	502	495	2,342	871
14.	Ajit Mills, Ltd., Rakhial Road, Ahmedabad ...	Messrs. Chinubhai Naranbhai & Co., Ltd., Agents, Office on Mill premises.	23,868	23,158	513	509	4,221	965
15.	Ananta Mills, Ltd., Rakhial Road, Ahmedabad.	Messrs. Jayantilal Amratlal, Ltd., Agents, Office on Mill premises.	19,208	18,914	450	449	4,799	893

16.	Aruna Mills, Ltd., Naroda Road, Ahmedabad	Messrs. P. M. Hutheesing & Sons, Ltd., Agents, P.B. No. 57, Ahmedabad.	39,964	39,282	912	894	5,007	1,492
17.	Arvind Mills, Ltd., Naroda Road, Ahmedabad.	Messrs. Narottam Lalbhai & Co., Agents, Office on Mill premises.	62,448	61,223	1,216	1,211	7,171	1,875
18.	Aryodaya Ginning and Mfg. Co., Ltd. (formerly Ahmedabad Vyapar Ootejack Spinning and Mfg. Co., Ltd.), Asarva Road, Ahmedabad.	Messrs. Mangaldas & Brother, Ltd., Agents, Office on Mill premises.	35,884	32,729	884	862	5,869	1,444
19. 20.	Aryodaya Spinning & Weaving Co., Ltd., No. 1, Asarva Road, Ahmedabad. Aryodaya Spinning & Weaving Co., Ltd., No. 2, Asarva Road, Ahmedabad.	Messrs. Mangaldas and Balabhai & Co., Agents, Post Box No. 146, Ahmedabad.	52,788	46,084	968	948	5,800	1,807
21.	Asarwa Mills, Ltd., No. 1, Asarva Post, Ahmedabad.	Messrs. Chhotabhai Patel & Co., Ltd., Agents, Kodak House, Hornby Road, Fort, Bombay.	27,904	27,214	594	581	4,160	1,027
22.	Asarva Mills No. 2 (formerly Shrinagar Mills, Ltd.), Saraspur Road, Railwaypura Post, Ahmedabad.	do.	18,460	18,007	436	434	3,406	784
23.	Asoka Mills, Ltd , Naroda Road, Ahmedabad.	Messrs. Lalbhai Dalpatbhai & Co., Agents, Post Box No. 55, Ahmedabad.	37,368	36,692	912	905	7,398	1,320
24.	Bechardas Spinning & Weaving Mills Co., Ltd., Rakhial Road, Ahmedabad.	Messrs. Durgaprasad S. Laskari & Co., Ltd., Agents, Office on Mill premises.	19,320	18,919	468	437	3,648	784
25.	Bhalakia Mills Co., Ltd., Kankaria Road, Ahmedabad.	Messrs. Chandulal & Co., Ltd., Agents, Office on Mill premises.	18,580	18,342	400	391	3,381	858
26. 27.	Bharatkhand Textile Mfg. Co., Ltd., No. 1, Camp Road, Ahmedabad. Bharatkhand Textile Mfg. Co., Ltd., No. 2, Camp Road, Ahmedabad.	Messrs. Jivanlal Girdharlal & Co., Ltd., Agents, Post Box No. 30, Ahmedabad.	31,720	28,770	914	823	3,825	1,274
28.	Bharat Suryodaya Mills Co., Ltd. (formerly India Spg. & Wvg. Co , Ltd.), Kankaria Road, Railwaypura, Ahmedabad.	Messrs. Chaturbujdas K. M. & Co., Mg. Agents, Post Box No. 125, Ahmedabad.	13,928	12,530	412	352	1,495	475
29.	Bihari Mills, Ltd., Near Khokra Mehmedabad, Ahmedabad.	Messrs. Motilal Harilal & Co., Ltd., Agents, Post Box No. 4, Ahmedabad.	18,240	17,665	440	428	3,522	776
30.	City of Ahmedabad Spinning and Manufacturing Co., Ltd., Kankaria Road, Ahmedabad.	Messrs. Chamanlal Mangaldas & Sons, Agents, Office on Mill premises.	26,202	17,310	367	282	835	164
31.	Commercial Ahmedabad Mills Co., Ltd , Outside Prem Darwaja, Ahmedabad.	Messrs Dhanjibhai and Tricumlal & Co., Ltd., Agents, Office on Mill premises.	30,264	28,360	620	614	4,315	1,036
32.	Fine Knitting Co., Ltd., Near Chamunda Mata, Asarva Road, Ahmedabad.	Messrs. H. Keshavlal & Co., Agents, Railwaypura, Ahmedabad.	9,000	9,000	...	...	1,224	312

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
33	Girdhardas Harivallabhdas Mills, Ltd. (formerly Rajnagar Mill No. 2), Near Idga Gate, Ahmedabad.	Messrs. Chamanlal Mangaldas & Co., Agents, Office on Mill premises.	21,808	21,061	...	...	2,418	469
34.	Gujarat Cotton Mills Co., Ltd., Naroda Road, Ahmedabad.	Messrs. Chaturam & Sons, Agents, Office on Mill premises.	31,258	25,247	606	527	2,074	852
35.	Gujarat Ginning & Mfg. Co., Ltd., Outside Prem Gate, Ahmedabad.	Messrs. Jamnabhai Mansukhbhai, Agents, Office in Mill premises	25,232	...	644	...	...	...
36.	Gujarat Hosiery Factory, Rakhial Road, Ahmedabad.	Messrs. C. C. Dalal & Co., Owners, Office on Mill premises.	10,620	10,259	...	...	976	246
37.	Gujarat Spinning & Weaving Co., Ltd., Outside Kalupur Gate, Ahmedabad.	Messrs Jamnabhai Mansukhbhai & Co., Agents, Office on Mill premises.	28,792	27,890	672	659	6,286	1,253
38.	Harivallabhdas Mulchand Mills Co., Ltd., Outside Darıapur Gate, Ahmedabad.	Messrs. Girdharlal Harilal & Co., Agents, Office on Mill premises.	18,400	18,119	430	422	3,391	736
39.	Hathising Manufacturing Co., Ltd., Outside Saraspur Gate, Ahmedabad.	Messrs Mancklal Mansubhai & Co., Agents, Post Box No. 2, Ahmedabad.	13,120	12,232	...	...	1,085	257
40.	Himabhai Manufacturing Co., Ltd., Near Saraspur Gate, Ahmedabad.	Messrs. Dhirajlal Khushaldas & Bros., Agents, Office on Mill premises.	17,560	16,482	436	417	2,036	701
41.	Jehangir Vakil Mills Co., Ltd., Outside Delhi Gate, Ahmedabad.	Messrs. Rustomjee Mangaldas & Co., Ltd., Agents, Office on Mill premises.	34,072	32,513	761	705	5,386	1,291
42.	Jitendra Mills, Ltd. (formerly Astodia Mill), Outside Astodia Gate, Ahmedabad.	Mr. N. K Jhaveri, Hon. Liquidator, 2972 Ratanpole, Ahmedabad.	3,600	...	...	...	...	...
43	Kalyan Mills, Ltd. (Deepak Textile Industries, Ltd., Lessees), Naroda Road, Ahmedabad.	Mr. Radheshyam R. Morarka, Director-in-Charge, 74 Marine Drive, Bombay.	13,260	12,287	393	30	441	559
44.	Lalbhai Tricumlal Mills, Ltd., Rakhial Road, Ahmedabad.	Messrs. Chinubhai Lalbhai and Bros., Ltd., Agents, Office on Mill premises	29,936	29,741	784	779	3,884	1,532
45.	Maheshwari Mills, Ltd (formerly Ahmedabad Cotton and Waste Mfg. Co., Ltd.), Shahibag Road, Ahmedabad.	Messrs. Dhirajlal Khushaldas & Co., Agents, Post Box No. 79, Ahmedabad.	21,032	20,603	528	528	1,774	791

46.	Maneckchowk and Ahmedabad Mfg. Co., Ltd., Nos. 1 and 2, Railwaypura Post, Ahmedabad.	Messrs. Hiralal Tricumlal & Sons, Agents, Office on Mill premises.	31,128	31,128	832	795	3,342	1,261
47.	Manecklal Harilal Spinning and Mfg. Co , Ltd., Saraspur, Ahmedabad.	Messrs. Harilal Harivalhabhdas & Co., Ltd., Agents, Office on Mill premises	33,636	32,893	750	740	6,421	1,370
48.	Marsden Spinning and Manufacturing Co., Ltd., Gomtipur, Ahmedabad.	Messrs. Marsden Bros. & Co., Ltd., Agents, Office on Mill premises.	22,244	21,761	482	476	5,304	1,179
49.	Monogram Mills Co., Ltd., Rakhial, Ahmedabad.	Messrs. Manilal, Marsden & Co., Ltd., Agents, Office on Mill premises.	24,872	24,812	528	524	6,034	1,169
50.	Nagri Mills Co., Ltd , Rajpur, Gomtipur Road, Ahmedabad	Messrs. Popatlal Chimanlal & Co., Agents, Post Box No. 36, Ahmedabad.	22,936	20,597	500	448	1,853	884
51.	New Commercial Mills Co., Ltd., Naroda Road, Ahmedabad.	Messrs. Tricumlal Bhogilal & Co., Ltd , Agents, Office on Mill premises.	39,316	39,127	866	848	5,130	1,459
52.	New Maneckchowk Spinning & Weaving Co., Ltd., Outside Dariapur Gate, Railwaypura, Ahmedabad.	Messrs. Lalbhai Tricumlal, Agents, Office on Mill premises.	29,656	29,265	607	605	4,506	1,157
53.	New National Mills, Ltd., Rakhial Road, Ahmedabad.	Messrs. Tricumlal Bhogilal Sons & Co., Agents, Office on Mill premises.	21,760	20,106	474	456	2,604	707
54.	New Rajpur Mills Co., Ltd. (formerly Rajpur Mill, Ltd.), Gomtipur Road, Ahmedabad.	Messrs. Bhikhabhai Jivabhai & Co., Ltd., Agents, Office on Mill premises.	23,688	20,654	424	420	2,217	702
55.	New Swadeshi Mills of Ahmedabad, Ltd. (formerly Ahmedabad Swadeshi Spinning and Mfg. Co., Ltd.), Naroda Road, Ahmedabad.	Messrs. The Cotton Agents, Ltd , Mg. Agents, Imperial Bank Bldg., Bank Street, Fort, Bombay.	35,312	33,334	796	786	9,980	1,702
56.	Nutan Mills, Ltd., Outside Nikoli Gate, Saraspur Road, Ahmedabad	Messrs Jagabhai Bhogilal Nanavaty & Co., Ltd , Agents, Office on Mill premises.	20,840	20,293	506	504	3,436	769
57.	Patell Mills Co., Ltd. (formerly Gomtipur Spinning, Weaving & Manufacturing Co., Ltd.), Gomtipur Road, Ahmedabad.	Messrs. Dhirajlal Chunilal & Co., Agents, Office on Mill premises.	13,824	13,639	356	355	1,304	508
58.	Raipur Manufacturing Co., Ltd., Outside Saraspur Gate, Ahmedabad.	Messrs Lalbhai Dalpatbhai & Co., Agents, Post Box No. 54, Ahmedabad.	31,120	30,535	637	632	2,375	1,054
59.	Rajnagar Spinning, Wvg. & Mfg. Co., Ltd., No. 1, Railwaypura Post, Camp Road, Ahmedabad.	Messrs. Mangaldas Girdhardas Parekh, Ltd., Agents, Post Box No. 124, Ahmedabad.	17,648	17,125	523	430	6,031 (59 and 60)	706
60.	Rajnagar Spinning, Wvg. & Mfg. Co., Ltd., No 2, Railwaypura Post, Camp Road, Ahmedabad.	do.	27,920	27,642	604	604		1,177
61.	Ramkumar Mills (formerly Shree Anand Cotton Mills, Ltd.), Saraspur Gate, Ahmedabad.	Messrs. Yadalam Bros., Ltd., Mg. Agents, Dhanalakshmi Bldg., Avenue Road, Bangalore 2.	19,740	...	406	...	...	...

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
62.	Rohit Mills, Ltd., Mithipur, Ahmedabad ...	Messrs. Lallubhai Gordhandas, Ltd., Agents, Kokhra, Mehmedabad, Mithipur, Ahmedabad.	28,188	27,199	648	646	3,728	1,208
63.	Rustom Jehangir Vakil Mills Co., Ltd., Outside Delhi Gate, Ahmedabad.	Messrs. Kantilal Shantilal & Co., Agents, Offices on Mill premises.	21,780	20,771	406	394	2,300	840
64.	Sarangpur Cotton Manufacturing Co., Ltd., No. 1, Outside Raipur Gate, Ahmedabad.	Messrs. Sakarlal Balabhai & Co., Ltd., Agents, Office on Mill premises.						
65.	Sarangpur Cotton Manufacturing Co., Ltd., No. 2, Near Jaganath Mahadev, Ahmedabad	do.	64,648	59,809	1,449	1,401	9,047	2,249
66.	Saraspur Mills, Ltd. (formerly Saraspur Manufacturing Co., Ltd.), Near Saraspur Gate, Ahmedabad.	Messrs. Lalbhai Dalpatbhai Sons & Co., Agents, Office on Mill premises.	35,196	34,852	856	815	6,514	1,405
67.	Shorrock Spinning and Manufacturing Co., Ltd., Asarva Road, Ahmedabad.	Messrs. Mafatlal Chandulal & Co. (Ahmedabad), Ltd., Agents, Office on Mill premises.	36,624	32,976	720	706	5,125	1,290
68.	Shree Sardar Spg. & Wvg. Mills (formerly National Mills Co., Ltd.), Gomtipur Road, Ahmedabad.	Messrs. Bhausaheb Deshai Bros., Owners, Office on Mill premises.	19,712	14,454	496	313	1,715	544
69.	Shri Ambica Mills, Ltd., No. 1, Kankaria Loco-Siding, Railwaypura, Ahmedabad.	Messrs. Harivallabhdas Kalidas & Co., Agents, Post Box No. 112, Ahmedabad.						
70.	Shri Ambica Mills, Ltd., No. 2 (formerly Chandrakhant Mills, Ltd.), Near Susker Lake, Ahmedabad	do.	71,796	68,868	1,383	1,311	6,005	2,148
71.	Shri Vivekanand Mills, Ltd., Railwaypura, Rakhial Road, Ahmedabad.	Messrs. Nanubhai Maneklal & Co., Ltd., Agents, Office on Mill premises.	20,416	19,830	456	443	2,976	770
72.	Silver Cotton Mills Co., Ltd., Kankaria Loco. Siding, Ahmedabad.	Messrs. Gopalbhai Balabhai & Co., Agents, Office on Mill premises.	21,988	20,876	506	501	3,498	952

73.	Vijaya Mills Co., Ltd., Naroda Road, Ahmedabad.	Messrs. Haridas Achratlal & Sons, Agents, Office on Mill premises.	28,816	28,335	680	680	4,517	1,128
74.	Vikram Mills, Ltd., Outside Saraspur Gate, Railwaypura, Ahmedabad.	Messrs. Ramanlal Lallubhai, Ltd, Agents, Office on Mill premises.	35,340	34,081	800	775	5,020	1,290
		Total ...	19,80,032	18,23,281	42,165	39,241	2,65,554	71,632

OTHER COTTON MILLS IN BOMBAY STATE

1.	Abdul Samad Haji Lal Muhammad Weaving Factory, Bhiwandi (Thana District).	Khan Saheb Abdul Samad Haji Lal Muhammad, Owner, Office on Mill premises	...	...	246	173	...	265
2.	Baroda Spinning and Weaving Co., Ltd., Pani Gate, Near Bhadra, Baroda.	Messrs Javerchand Laxmichand & Co., Agents, Office on Mill premises.	34,080	33,319	658	639	4,761	1,226
3.	Barsi Spinning & Weaving Mills, Ltd., Barsi Town (District Sholapur).	Messrs. Desai Sons & Co., Managing Agents, Neptune Bldg., 104 Apollo Street, Fort, Bombay.	11,380	10,199	280	268	3,691	769
4.	Bharat Spg. & Wvg. Co., Ltd., No. 1 (formerly Hubli Mills, Ltd.), Hubli.	Messrs. Purshotam Govindjee and Co., Managing Agents, Gool Mansion, Homji Street, Fort, Bombay.	2,192 *508*	22,661 (Nos. 4 and 5)	604	431	4,038	1,266
5.	Bharat Spg. & Wvg. Co., Ltd., No 2 (formerly Hubli Mills, Ltd.), Hubli.	do.	26,204					
6.	Bharat Vijaya Mills, Ltd. (formerly Kalol Kapadia Spg & Wvg. Mills Co., Ltd.), Kalol (North Gujarat).	Messrs. Ramanlal Champaklal & Co, Agents, Office on Mill premises.	16,824	16,004	320	296	2,299	585
7.	Broach Fine Counts Spg. & Wvg. Co., Ltd. (formerly Broach Industrial Cotton Spg. & Wvg. Co., Ltd.), Mohamadpura Road, Near Station, Broach.	Messrs. Brijlal Bilasrai & Co., Agents, Office on Mill premises.	28,848	...	542	...	...	...
8.	Chalisgaon Shri Laxmi Narayan Mills, Co., Ltd. (formerly Shri Laxmi Narayan Mills of the New Ginning, Pressing & Mfg. Co., Ltd.), Chalisgaon, East Khandesh.	Messrs. Narayan Bankat, Agent, Office on Mill premises.	22,636	19,771	604	457	3,907	942
9.	Chhotalal Mills, Ltd. (formerly Kalol Cotton Mills Co, Ltd.), Kalol (North Gujarat).	Messrs. Chotalal Hirachand & Co., Agents, Office on Mill premises.	19,472	18,398	456	396	5,686	760
10.	Gaekwar Mills, Ltd., Billimora ...	Messrs. H. M. Mehta & Co., Ltd., Agents, Office on Mill premises.	28,692	27,437	662	653	3,797	1,088
11.	Gendalal Mills, Ltd. (formerly Bhagirath Spinning & Manufacturing Co., Ltd.), Jalgaon, East Khandesh.	Surajmal Gendalal Badjatia, Esq., Managing Director, Office on Mill premises.	13,848	12,900	370	342	3,704	702

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
12.	Gokak Mills, Ltd. (formerly Gokak Water Power & Mfg. Co., Ltd.), Gokak Falls, Belgaum District, S.M.C.	Messrs. Forbes, Forbes Campbell & Co., Ltd., Agents, Forbes Building, Home Street, Fort, Bombay.	73,248	69,979	2	...	10,507	2,494
13.	Gopal Mills Co., Ltd. (formerly Whittle Spg. & Mfg. Co., Ltd.), Mill No. 1, Mahatma Gandhi Road, Broach.							
14.	Gopal Mills Co., Ltd. (formerly Whittle Spg. & Mfg Co., Ltd.) Mill No. 2, Mahatma Gandhi Road, Broach.	Messrs. Nanddas Haridas & Co., Agents, C/o The Vijaya Mills Co., Ltd., Naroda Road, Ahmedabad.	21,748	21,256	652	526	4,450	1,239
15.	Gopal Mills Co., Ltd. (formerly Whittle Spg & Mfg. Co., Ltd.), Mill No. 3, Mahatma Gandhi Road, Broach.							
16.	Jam Shri Ranjitsinghji Spinning and Weaving Mills, Co., Ltd., Station Road, Sholapur.	Messrs. Lalji Naranji & Co., Agents, 11 Bank Street, Fort, Bombay.	19,952 *868*	19,496	511	481	3,440	1,093
17.	Jayashankar Mills, Barsi, Ltd., Barsi Town.	Messrs. Zadbuke & Co., Agents, Office on Mill premises.	11,840	11,766	...	...	2,257	498
18.	Kanti Cotton Mills, Ltd. (formerly Wadhwan Camp Mills), Surendranagar, Wadhwan Camp (Saurashtra).	Messrs. Chandulal Ratilal & Co., Mg. Agents, Office on Mill premises.	15,724	15,203	316	285	4,183	699
19.	Keshav Mills Co., Ltd., Petlad, Via Anand ...	Messrs. Chandulal Keshavlal & Co., Agents, Office on Mill premises.	24,656	20,111	400	297	2,259	701
20.	Khandeish Spinning and Wvg. Mills Co., Ltd., Jalgaon, East Khandesh.	Messrs. Indra Singh & Sons, Ltd., Secretaries and Treasurers, Eros Theatre Building, Jamshedji Tata Road, Churchgate, Bombay.	23,032	22,808	465	461	2,589	904
21.	Krishna Kumar Mills Co., Ltd., Mahuva (Saurashtra).	Messrs. Surendranath Maganlal & Co., Agents, Office on Mill premises.	8,496	8,300	...	...	3,061	316
22.	Lakshmi Cotton Manufacturing Co., Ltd., Sholapur.	Messrs. The Bombay Co., Ltd., Secretaries, Treasurers and Agents, 9 Wallace Street, Fort, Bombay.	51,924	47,729	1,213	1,210	7,889	2,824

23.	Lokamanya Mills, Barsi, Ltd., Arangaon Road, Barsi Town.	Messrs Sulakhe & Co., Managing Agents, Office on Mill premises.	12,504	11,510	...	...	2,084	440
24.	Madhavnagar Cotton Mills, Ltd., P.O. Madhavnagar, Budhagaon (M.S.M.).	Messrs. Budhgaon Trading Co., Ltd., Mg. Agents, Office on Mill premises.	9,056	5,993	80	...	695	239
25.	Mafatlal Fine Spg. and Manufacturing Co., Ltd., Vejalpur Road, Navsari.	Messrs. Navinchandra Purshotamdas & Co., Ltd., Agents, Office on Mill premises.	47,260	46,034	896	894	5,439	1,456
26.	Mahalaxmi Mills, Ltd., Near Chawdi Gate, Bhavnagar.	Messrs. Hargovandas Jivandas & Sons, Ltd., Agents, Office on Mill premises.	20,688	16,773	480	451	6,473	1,227
27.	Mahendra Mills, Ltd., Kalol (N. Gujarat) ..	Messrs. J. R. Patel & Sons, Ltd., Agents, Office on Mill premises.	5,040	...	...	...	...	...
28.	Maharana Mills, Ltd., Porbandar (Kathiawar).	Shree Dhirendrabhai Nanjibhai Mehta, Owner, Swastik Bhuwan, Ugawda Road, Porbandar.	23,780	23,148	586	573	5,833	1,077
29.	Marathe Textile Mills, Near Railway Station, Miraj (S.M.C.).	Messrs. B. K. Marathe & Sons, Proprietors, Office on Mill premises.	5,412	2,133	...	...	122	429
30.	Narayandas Chunilal Cotton Spg. & Wvg. Mills, (formerly Gadag Cotton Spinning & Weaving Mills), Gadag, Dharwar (West).	Shrimati Tarabai Motilal Hirakhanwala, Owner, 36 Ridge Road, Malabar Hill, Bombay	11,384	10,044	212	133	1,314	447
31	Narsinggirji Manufacturing Co., Ltd., Station Road, Sholapur.	Dhanrajgir Raja Narsinggirji, Agent, Dhanraj Mahal, Apollo Pier Road, Bombay.	55,488	50,237	1,170	1,122	10,080	2,350
32.	Navjivan Mills, Ltd (formerly Kalol Swadeshi Mills Co., Ltd.), Kalol, North Gujarat.	Messrs. Rustomjee Mangaldas & Co., Agents, Office on Mill premises.	24,372	22,032	510	505	3,125	983
33.	Navsari Cotton and Silk Mills, Ltd. (formerly New Darbanga Mills), Navsari	Messrs. H. M. Mehta & Sons, Ltd., Agents, Navsari.	18,520	16,590	435	405	2,538	753
34.	New Chhotalal Mills, Ltd. (formerly Khadi Laxmi Cotton Mills Co., Ltd.), Khadi.	Messrs. Chhotalal Hirachand & Sons, Agents, Office on Mill premises.	19,440	19,308	404	363	2,992	793
35.	New India Industries, Ltd., Jetalpur Road, Baroda	Messrs. Distributors (Baroda), Ltd., Agents, Race Course Road, Baroda.	12,996	6,720	...	...	1,201	190
36.	New Jehangir Vakil Mills Co., Ltd. (formerly Venishunker Luxmishunker Cotton Mills Co., Ltd.), Bhavnagar.	Messrs Rustomji Mangaldas & Co., Agents, Bhavnagar.	31,940	31,315	714	674	5,370	1,417
37.	New Pratap Spg., Wvg. and Mfg. Co., Ltd., Dhulia, W. Khandesh.	Messrs. Motilal Maneckchand & Sons, Agents, Office on Mill premises.	46,136	45,720	1,058	1,017	5,142	2,155
38.	New Shorrock Spinning and Manufacturing Co., Ltd. (formerly Nadiad Swadeshi Spinning, Weaving and Manufacturing Co., Ltd.), Nadiad, Dist. Kaira.	Messrs. Mafatlal Chandulal & Co., Ltd., Secretaries, Treasurers and Agents, Asarva Road, Railwaypura Post, Ahmedabad.	47,952	46,826	865	863	4,793	1,666

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
39.	Niranjan Mills, Ltd. (formerly Tikayaram Mills), Falsawadi, Surat.	Messrs. Shapoorji & Co., Agents, Office on Mill premises.	9,088	7,813	320	279	1,298	463
40.	Petlad Bulakhidas Mills Co., Ltd., Near Station Road, Petlad (*Via* Anand).	Messrs. Motilal Kashandas & Co., Secretaries, Treasurers and Agents, Station Road, Petlad.	18,256	17,986	...	...	4,419	577
41.	Prabha Mills (formerly Viramgam Mills, Ltd.), Fulwadi Road, Viramgam (with Receivers).	Messrs. Sanjiban Bannerjee & M. D. Mehta, Jt. Receivers, 59 Forbes Street, Fort, Bombay.	23,688	22,911	558	543	2,750	1,072
42.	Pratap Spg., Wvg. and Mfg. Co., Ltd. (1 & 2), Amalner, East Khandesh.	Messrs. Motilal Maneckchand & Co., Agents, Office on Mill premises.	48,952	46,646	1,083	1,055	5,925	2,547
43.	Raja Bahadur Motilal Poona Mills, Ltd. (formerly Poona Cotton and Silk Manufacturing Co., Ltd.), 5 Raja Bahadur Motilal Road, Poona.	Messrs. Mukundlal Bansilal & Sons, Agents, Hamam House, Hamam St., Fort, Bombay.	17,568	16,889	568	535	4,475	965
44.	Raja Raghunathrao Mills, Bhor	Messrs. Maharashtra Textiles, Ltd., Owners, Office on Mill premises.	852	...	41	40	...	60
45.	Rajkot Spg. & Wvg. Mills, Ltd., Karansinghji Cross Road, Karanpura, Rajkot (Kathiawar).	Messrs. Shapoorji Pallonji & Co., Ltd., Agents, Office on Mill premises.	10,872	10,692	235	232	2,111	545
46.	Rajratna Naranbhai Mills Co., Ltd., Petlad .	Messrs. Ramanlal Keshavlal & Co., Agents, Office on Mill premises.	25,552	21,402	414	382	3,373	840
47.	Santokbai Spinning & Weaving Factory, Nari Road, Bhavnagar.	Messrs. Govindlal Gandalal Gundigara, Owners, Office on Mill premises.	3,272	...	...	...	...	...
48.	Secunder Sari Mills, Sowdagar Mohalla, Bhiwandi (Thana District).	Abdul Quadir Secunder Patel, Esq., Owner, Office on Mill premises.	...	...	103	60	...	48
49.	Shah Spg. & Wvg. Mills (formerly Anjar Spinning & Weaving Mills Co., Ltd.), Anjar (Kutch).	P. V. Shah, Esq., Proprietor, Office on Mill premises.	5,312	3,840	...	...	454	164

50.	Sholapur Spinning & Weaving Co., Ltd., Station Road, Sholapur.	Managed by Board of Directors, Standard Building, Fort, Bombay.	1,05,296	72,009	2,234	2,159	11,147	3,811
51.	Shree Balaji Spinning, Weaving & Oil Mills, Extension Part, Sangli.	Jaynarayan Shivnath Ladda, Esq., Proprietor, Office on Mill premises.	5,476	4,477	96	85	500	234
52.	Shree Digvijayasinghji Spg. & Wvg. Mills, Bedeshwar Bunder Road, Jamnagar.	Messrs. Chaitanyakumar Mangaldas & Co., Ltd., Agents, Office on Mill premises.	15,000	14,783	100	95	4,561	589
53.	Shree Hari Cotton Mills, Ltd. formerly Siddhraj Mills), Near Railway Station, Siddhpur (N.G.).	Messrs. Jalan Bros., Proprietors, Office on Mill premises.	3,262	...	...	...	...	...
54.	Shree Harshad Textile Mills, Jamnagar (Saurashtra).	Messrs. P. V. Shah, D. K. Shah & G. M. Maroo, Partners, Office on Mill premises.	...	...	92	72	...	165
55.	Shri Ramesh Cotton Mills, Ltd. (fomerly Morvi Cotton Mills, Ltd.), Morvi (Kathiawar).	Messrs. The Morvi Industries, Ltd., Agents, Office on Mill premises.	12,000	10,784	324	310	2,550	553
56.	Shree Sayaji Jubilee Cotton & Jute Mills Co., Ltd., Sidhpur (R.-M. Railway), Opposite Ry. Station.	Messrs. Prelhadji Sevakram & Co., Ltd., Agents, Opposite Station, Sidhpur.	14,412	...	320	...	...	...
57.	Shree Shubhlaxmi Mills, Ltd. (formerly Shree Vijaylaxmi Cotton Mills, Ltd.), Station Road, Cambay (Dist. Kaira).	Shree Govind Cotton Co., Ltd., Mg. Agents, Office on Mill premises.	18,688	18,016	340	335	1,878	673
58.	Shree Yamuna Mills Co., Ltd. (formerly New Baroda Mills Co., Ltd.), Pratapnagar, Baroda.	Messrs. Zaverchand Laxmichand Bros. & Co., Agents, Office on Mill premises.	24,248	24,088	632	483	3,101	1,040
59.	Shri Amarsinghji Mills, Ltd., Wankaner (Saurashtra).	Messrs. Jayantilal Amratlal & Co., Ltd., Agents, Office on Mill premises.	12,624	12,464	320	303	3,427	685
60.	Shri Gajanan Weaving Mills, Sudamapuri, Sangli, S.M.C.	Mr. V. R Velankar, Proprietor, Office on Mill premises.	5,376	...	135	74	...	141
61.	Shri Jagdish Mills, Ltd. (formerly Maharaja Mills Co., Ltd.), Padra Road, Baroda.	Messrs. Jagdish (Agency), Ltd., Office on Mill premises.	20,320	20,169	408	402	2,221	884
62.	Shri Laxmi Textile Mills, Ltd., Bhor ...	Messrs. Bhor Mercantile Agency, Ltd., Agents, Office on Mill premises.	4,176	3,038	...	...	536	122
63.	Shri Narayan Weaving Mills, Ichalkaranji, S.M.C.	Messrs. Sangle Bros., Owners, Office on Mill premises.	...	...	92	26	...	62
64.	Shri Sayaji Mills Co., Ltd., Near Ry. Station, Baroda.	Messrs. Vadilal Lallubhai & Co., Office on Mill premises.	36,004	27,756	602	574	3,836	969
65.	Shri Shahu Chhatrapati Mills, Shahupuri, Kolhapur, S.M C.	Messrs. James, Finlay & Co., Ltd., Agents, Chartered Bank Building, Fort, Bombay.	15,988	15,511	320	317	3,887	647
66.	Sidhpur Mills Co., Ltd., Bindu Sarovar Road, Sidhpur	Messrs. Maganlal Parbhudas & Co., Agents, Office on Mill premises.	27,760	22,449	306	258	5,856	690

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
67. Surat Cotton Spinning and Weaving Mills, Ltd., Nawabwadi, Surat.	Mr Navinchandra Mafatlal, Mg. Director, 29 Veer Nariman Road, Fort, Bombay	20,308	24,855	476	466	2,839	869
68. Surat Textile Mills, Ltd., Varachha Road, Surat.	Messrs Kanchanlal Kapadia & Co., Ltd., Mg Agents, Office on Mill premises	9,600	7,370	...	...	154	48
69. Swadeshi Wvg. Mills, opp. Godhra Electric Power House, Bhavnagar.	Messrs. Thakkar Bros , Owners, Office on Mill premises.	...	...	65	60	...	77
70. Tikekar Textile Mill, Ltd , Tikekarwadi, Sholapur District.	Messrs. Naik and Company, Agents, Office on Mill premises.	...	...	60	...	...	...
71. Venkatesh Rang Tantu Mills, Ichalkaranji, S M.C., Opp. Ry. Station, Nandol.	Messrs. S. K. Datar, A. V. Datar, V. Y. Datar & M. V. Datar, Owners, Office on Mill premises.	...	...	56	21	...	50
72. Venus Textile Mills, Ltd., Degham (in Voluntary liquidation)	Messrs. T. Bhogilal & Sons, Ltd., Agents, Office on Mill premises.	3,452	...	...	...	...	...
73. Vishnu Cotton Mill, Ltd., Sholapur ...	Messrs. The Bombay Co., Ltd., Secretaries, Treasurers and Agents, 9 Wallace Street, Fort, Bombay.	54,280	50,575	1,495	1,466	8,755	2,809
	Total ..	14,18,446 *1,376*	12,28,243	27,506	24,547	2,09,772	56,392

COTTON MILLS IN OTHER STATES

RAJASTHAN, AJMER & PEPSU

1. Edward Mills Co., Ltd., Beawar	Rai Saheb Seth Motilal Raniwala, Mg. Director, Diggi Street, Beawar.	20,488	19,313	376	376	5,388	1,041
2. Jagatjit Cotton Textile Mills, Ltd., Phagwara (PEPSU).	Messrs. Karamchand Thapar & Bros., Ltd., Mg. Agents, 5 Royal Exchange Place, Calcutta.	17,856	8,230	390	327	1,207	451

3.	Jaipur Spg. & Wvg. Mills, Ltd., Near Power House, Jaipur.	Messrs. Shree Laxmi Traders, Ltd., Mg. Agents, Jobner Baug, Jaipur.	15,576	10,893	...	...	3,729	465
4.	Kotah Textiles Ltd., Bhimgunj, Kotah Jn. ...	Messrs. Motiram Chhangomal Rupani, Mg. Agents, Office on Mill premises.	7,590	...	160	...	...	...
5.	Krishna Mills, Ltd., Near Ry. Station, Beawar.	Messrs. Thakurdas Khinvraj & Co., Secretaries, Treasurers & Agents, Beawar.	15,640 *2,628*	17,912	636	610	7,485	1,282
6.	Mahalakshmi Mills Co., Ltd., Beawar ...	Seth Mukund Dasji Rathi, Mg. Director, Beawar.	13,728	13,415	416	409	4,054	807
7.	Maharajah Kishengarh Mills, Ltd., Madanganj, Kishengarh.	Messrs. Soni Industrial Agencies, Ltd., Mg Agents, Office on Mill premises.	22,330 *4,320*	20,600	392	368	4,850	1,053
8.	Maharajah Sri Umaid Mills, Ltd., Pali-Marwar	Messrs. The Shree Krishna Agency, Ltd., Agents, Office on Mill premises.	17,560	17,045	434	431	11,480	1,263
9.	Meawar Textile Mills, Ltd., Bhilwara (Rajasthan).	Messrs. Sobhag Agencies, Ltd., Managing Agents, Office on Mill premises.	7,812	7,585	250	234	5,156	732
10.	Shree Bijay Cotton Mills, Ltd. (formerly Bijay Laxmi Cloth Mills Co.), Near Ry. Station, Bijaynagar (Ajmer)	Seth Raghunathsing Mansinghka, Mg. Director, Office on Mill premises.	13,720	12,477	310	257	4,221	778
11.	Shree Mahadeo Cotton Mills, Ltd., Bhilwara (Rajasthan).	Seth Sanwarmal Mansinghka, Mg Director, Office on Mill premises.	3,260 *1,280*	...	45	...	...	...
12.	Shree Sadul Textiles, Ltd., Shri Ganganagar, Rajasthan.	Messrs. J P Srivastava & Sons (Bikaner), Ltd., Mg Agents, Office on Mill premises.	15,296	2,296	...	...	109	75
		Total ..	1,70,856 *8,228*	1,29,766	3,409	3,012	47,679	7,947
	MADHYA PRADESH							
1.	Bengal-Nagpur Cotton Mills, Ltd., Rajnandgaon.	Messrs. Shaw Wallace & Co., Managing Agents, 4 Bankshall Street, Calcutta.	31,476	28,845	766	678	6,721	1,822
2.	Berar Manufacturing Co., Ltd., Badnera ...	Messrs Kasturchand Dadabhoy & Co., Agents, 24B Rajabahadur Mansions, Hamam Street, Fort, Bombay.	21,384	15,000	369	350	979	750
3.	Burhanpur Tapti Mill, Ltd, Burhanpur. ...	Messrs. P N Mehta & Sons, Agents, Cooks Building, Hornby Road, Fort, Bombay.	29,512	26,895	730	730	7,138	1,787
4.	Central India Spinning, Weaving and Mfg. Co., Ltd. (Empress Mills), Nagpur.	Messrs. Tata Industries, Ltd., Mg Agents, Bombay House, 24 Bruce Street, Fort, Bombay.	1,15,188	1,01,906	2,168	2,013	18,582	5,633
5.	Model Mills, Nagpur, Ltd., Umrer Road, Nagpur.	Messrs. Bansilal Abirchand Dadabhoy & Co., Agents, Ilaco House, Sir Phirozshah Mehta Road, Fort, Bombay.	52,408	49,707	952	940	10,929	2,437

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
6. Pulgaon Cotton Mills, Ltd. (formerly Pulgaon Cotton Spinning, Weaving and Manufacturing Co., Ltd.), Pulgaon, Dist. Wardha.	Messrs. Hardayal Sons, Mg. Agents, 59 Apollo Street, Fort, Bombay.	17,596	14,991	246	234	4,637	891
7. Rai Bahadur Bansilal Abirchand Spinning and Weaving Mills, Hinganghat, Dist. Wardha.	Shrimati Sodradevi N. Daga and Others, Owners, Office on Mill premises.	31,600	28,493	396	353	4,190	1,093
8. Rai Saheb Rekchand Mohota Spinning and Weaving Mills, Ltd., Hinganghat, Dist. Wardha.	Seth Mathuradas Mohota, Mg. Director, Hinganghat.	22,408 *442*	20,866	412	402	3,888	1,085
9. R.S. Reckchand Gopaldas Mohota Spg. & Wvg. Mills, Ltd. (formerly Akola Cotton Mills, Ltd.), Akola.	Messrs. Bulakidas Mohota & Co , Ltd., Mg. Agents, Office on Mill premises.	21,408 *468*	20,916	466	456	6,470	1,227
10. Savatram Ramprasad Mills Co , Ltd., Tajnapeth, Akola.	Messrs. Savatram Sons, Ltd., Agents, Akola.	13,096	12,355	317	294	3,694	692
11. Vidarbha Mills, Berar, Ltd., Ellichpur, Amraoti District.	Messrs. Deshmukh & Co., Secretaries, Treasurers and Agents, Office on Mill premises.	12,444	11,940	347	339	3,133	672
	Total ...	3,68,520 *910*	3,31,914	7,169	6,789	70,361	18,089
BIHAR AND ORISSA							
1. Bihar Cotton Mills, Ltd., Phulwari-Sharif, Patna.	Messrs. Kashinath & Co., Ltd., Mg. Agents, P O. Phulwari Sharif, Patna.	8,000	7,838	159	156	892	392
2. Gaya Cotton and Jute Mills, Ltd., Gaya ...	Managed by Board of Directors, Office on Mill premises.	18,352 *1,188*	11,142	586	271	379	683
3. Orissa Textile Mills, Ltd., Chowdwar, Cuttack.	Messrs. B. Pattnaik & Co., Mg. Agents, Office on Mill premises.	33,404	29,388	432	405	7,847	1,197
	Total ..	59,756 *1,188*	48,368	1,177	832	9,118	2,272

	HYDERABAD STATE							
1.	Aurangabad Mills, Ltd., Aurangabad ...	Messrs. Gupta Sons, Ltd., Mg. Agents, Office on Mill premises.	11,536	11,349	271	238	2,274	435
2.	Azam Jahi Mills, Ltd., Warrangal ...	The Industrial Trust Fund, Government of Hyderabad, Agents, 159 Gunfoundry Road, Hyderabad (Deccan).	19,944	19,600	440	438	9,240	1,256
3.	Dewan Bahadur Ramgopal Mills, Ltd., Elchigudda, Secunderabad, Deccan.	Messrs. Lachminarayan Ramgopal & Sons, Ltd., Agents, Post Box No. 5, Secunderabad (Dn.).	16,376	15,411	324	311	3,938	750
4.	Hyderabad (Deccan) Spg. and Wvg. Co., Ltd., Elchigudda, Secunderabad (Deccan).	Messrs. Mahboob Shahi Kulbarga Mills Co., Ltd., Secretaries, Treasurers and Agents, Post Box No. 15, Secunderabad (Dn.).	11,960	10,909	241	172	1,543	865
5.	Jiwan Textiles Mills, Mir Ali Tank Road, Hyderabad (Dn.).	R. R. Jiwanlal, Esq., Owner, Pathengatty, Hyderabad (Dn.).	...	...	58	24	...	59
6.	Mahaboob Shahi Kulburga Mills Co., Ltd., Gulbarga.	Messrs. Dayaram Surajmal Lahoti, Agents, Begumpet (Deccan).	27,764	27,525	606	583	7,851	1,868
7.	Osmanshahi Mills, Ltd., Nanded	The Industrial Trust Fund, Government of Hyderabad, Agents, 159 Gunfoundry Road, Hyderabad (Deccan).	26,016	24,480	640	636	10,537	1,522
		Total ...	1,13,596	1,09,274	2,580	2,402	35,383	6,755
	MADHYA BHARAT AND BHOPAL							
1.	Binod Mills Co., Ltd. (Binod Mills), Ujjain, Gwalior.	Messrs. Binodiram Balchand, Ltd., Secretaries, Treasurers and Agents, Office on Mill premises.	35,968	33,504	860	829	} 10,852	2,057
2.	Binod Mills Co., Ltd. (Deepchand Mills, formerly Sipra Cotton Mill), Gwalior.	do.	20,176	18,904	480	450		761
3.	Hira Mills, Ltd., Ujjain	Sir Sarupchand Hukamchand & Co., Agents, Sitalmata Bazar, Indore.	27,540	25,308	864	765	7,904	1,504
4.	Hukamchand Mills, Ltd., Indore	Sir Hukamchand & Mannalal Co., Secretaries, Treasurers and Agents, Office on Mill premises.	43,920 *468*	40,314	1,488	1,410	14,982	3,385
5.	Indore-Malwa United Mills, Ltd. (Old Mills), Indore City. }	Messrs. Govindram Seksaria (Indore), Mg. Agents, 139 Medows Street, Fort, Bombay.	50,020	47,002	1,420	1,195	16,525	3,308
6.	Indore-Malwa United Mills, Ltd. (New Mills), Indore City. }							

	NAMES OF MILLS	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
7.	Jiyajeerao Cotton Mills, Ltd., Gwalior (Near Morar Road Station).	Messrs. Birla Bros. (Gwalior), Ltd., Managing Agents, Baijal Kothi, Morar, Gwalior, P.O. Birla Nagar.	50,376	48,677	1,456	1,303	19,568	2,588
8.	Kalyanmal Mills, Ltd., 14, Silnath Camp, Indore.	Messrs. Tillockchand Kalyanmal & Co., Secretaries, Treasurers and Agents, Office on Mill premises.	36,412	36,098	956	929	10,987	2,249
9.	K. S. Nazarali Mills Nijatpura, Ujjain.	Seth Muhamed Hussein Bhai, Mg. Proprietor, Nijatpura, Ujjain.	17,288	14,478	379	343	2,475	693
10.	Mandsaur Textile Mills, Mandsaur ...	Mr. Laxmi Narayan, Proprietor, Office on Mill premises.	10,048	...	110	...	...	...
11.	Motilal Agarwal Mills, Ltd., Gwalior (Near Morar Road Railway Station).	L. Bansidar Bansal, Esq., Mg. Director, Office on Mill premises	12,500	9,358	...	...	2,354	327
12.	Nandlal Bhandari Mills, Ltd., Indore ...	Messrs. Nandlal Bhandari & Sons, Ltd., Secretaries, Treasurers and Agents, Office on Mill premises.	27,428 *580*	27,711	771	716	11,523	1,678
13	New Bhopal Textiles, Ltd. (formerly Bhopal Textiles), Bhopal.	Messrs. Sri J. P. Srivastava and Sons (Bhopal), Ltd., Nishat Manzil, Shamila, Bhopal.	14,112	13,137	400	399	6,574	907
14.	Rai Bahadur Kanhaiyalal Bhandari Mills, Ltd. (formerly the Maharajah Mill), Malgodown Road, Indore.	Messrs. Nandlal Bhandari & Sons, Agents, Office on Mill premises.	15,696	...	351	...	...	...
15.	Rajkumar Mills, Ltd., Silnath Camp Road, Indore	Sir Sarupchand Hukamchand & Co., Agents, Office on Mill premises.	22,368	19,857	609	566	7,271	1,625
16.	Shree Sajjan Mills, Ltd. (formerly Rutlam Bombay United Spg. and Wvg. Co., Ltd.), Ratlam.	Messrs. Gopaldas Liladhar & Co., Ltd., Agents, Office on Mill premises.	15,824	15,268	440	383	4,809	1,030
17.	Shri Maharani Mahalsabai Cotton Mills Co., Ltd., Dewas Junior.	Seth Dwarkadas Dharamsey, Agent, Station Road, Ratlam.	11,776	7,930	192	156	2,093	472

18.	Swadeshi Cotton and Flour Mills, Ltd., Silnath Camp, Indore City.	Messrs. Jagannath Narayan & Co., Managing Agents, Sanyogitganj, Indore.	22,316	15,793	364	350	4,709	978
		Total ..	4,33,768 1,048	3,73,339	11,140	9,794	1,22,626	23,562
	WEST BENGAL							
1.	Arati Cotton Mills, Ltd., Dassangar, Howrah.	Messrs. Dass Bros., Mg. Agents, 29 Strand Road, Calcutta.	4,860	3,951	172	125	526	311
2.	Banga Sri Cotton Mills, Ltd., Sodepore, P.O. Sukchar (24 Parganas).	Messrs. Shah Chaudhuri & Co., Ltd., Agents, Office on Mill premises.	10,728	10,218	276	276	1,704	515
3.	Bangeswari Cotton Mills, Ltd., Serampore, Hoogly.	Dr. Narendranath Law, Managing Director, 63 Radhabazar, Calcutta.	9,800	9,072	300	290	1,256	494
4.	Bangodaya Cotton Mills, Ltd., Panihati, District, 24 Parganas.	Messrs. Ranjit, Ltd., Mg. Agents, Office on Mill premises.	...	...	340	180	...	293
5	Basanti Cotton Mills, Ltd., Barrackpore Trunk Road, Panihati, 24 Parganas.	Messrs. The Calcutta Agencies, Ltd., Mg. Agents, 24 Netaji Subhas Road, Calcutta.	12,664	12,243	356	327	1,655	731
6.	Bengal Belting Works, Ltd., Bosepura Lane, Serampore.	Mr. S. C. Dey, Mg. Director, 2 Dalhousie Square East, Calcutta.	2,620	2,300	104	43	730	253
7.	Bengal Luxmi Cotton Mills, Ltd., Serampore, Dist. Hooghly.	Messrs The Bengal Textile Agency, Agents, 7 Chowringhee Road, Calcutta.	26,632	23,894	936	920	3,816	1,555
8.	Bowreah Cotton Mills Co., Ltd., Bowreah, Dist. Howrah.	Messrs. Kettlewell Bullen & Co., Ltd., Mg. Agents, 21 Strand Road, Calcutta.	42,872	42,872	841	841	3,673	2,016
9.	Dhakeswari Cotton Mills Ltd., No 3 (Mill No. 1 and 2 in East Pakistan), Suryyanagar, P.O. Burnpur (Burdwan Dist.).	Mr. S. K. Basu, Mg. Director, Manak Bldg., 4 Chowringhee Road, Calcutta 16.	7,000	400	80	70	61	483
10.	Dunbar Mills, Ltd., No. 1, Shamnagar (District 24 Parganas).	Messrs. Kettlewell Bullen & Co, Ltd., Agents, 21 Strand Road, Calcutta.	42,944	42,944	518	518	4,521	2,198
11.	Dunbar Mills, Ltd., No. 2, Shamnagar (District 24 Parganas).							
12.	Dunbar Mills, Ltd., No. 3, Shamnagar (District 24 Parganas)							
13.	Dunbar Mills, Ltd, No. 4, Shamnagar (District 24 Parganas).							
14.	East India Corporation, Ltd., United No. 1, Maurigram, Howrah District.	Managed by Board of Directors, 18 Netaji Subhas Road, Calcutta.	...	...	120	110	...	194
15.	East India Corporation, Ltd, United No. 2, 34/1, Bon Behari Bose Road, Howrah							
16.	Hindustan Cotton Mills, Ltd., Belgurriah, 24 Parganas.	Managed by Board of Directors, Calcutta National Bank Buildings, P. 2 Mission Row Extension, Calcutta.	...	...	120	88	...	116

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
17.	Hooghly Cotton Mills, Serampore.	Mr. A. W. Sen, Proprietor, Serampore.	...	...	...	...	...	...
18.	Kalyan Spg. & Wvg. Mills, Ltd., Birathi, Dum Dum (24 Parganas).	Messrs. A. K. Choudhuri & Co., Ltd., Mg. Agents, 87 Dharamtola Street, Calcutta.	12,125	5,287	...	...	855	198
19.	Kesoram Cotton Mills, Ltd. (formerly Allied Cotton and Dye Works, Ltd.), 42, Garden Reach Road, Calcutta.	Messrs. Birla Bros., Ltd., Agents, 8 Royal Exchange Place, Calcutta.	69,352	66,840	1,990	1,629	19,807	4,376
20.	Mahalaxmi Cotton Mills, Ltd., Palta, 24 Parganas.	Messrs. H. Datta & Sons, Ltd., Mg. Agents, 15 Clive Street, Calcutta.	5,788	5,391	169	166	1,079	347
21.	Manindra Mills, Ltd., Cossimbazar, Murshidabad, West Bengal.	Messrs. Chowdhury Roy & Co., Ltd., 23 Hurro Chunder Mullick Street, Calcutta.	...	...	182	144	...	230
22.	Mohini Mills, Ltd. (Mill No. 2), Belghurriah, 24 Parganas (Mill No. 1 in E. Pakistan).	Messrs. Chakravarti Sons & Co., Managing Agents, 22 Canning Street, Calcutta.	23,112	19,900	439	435	3,084	1,005
23.	Rampooria Cotton Mills, Ltd. (formerly Shri Narsing Cotton Mill), Serampore, Mohesh, E.I. Ry., Bengal.	Messrs. Hazarimull Heeralal, Mg. Agents, 148 Cotton Street, Calcutta.	23,196	21,408	795	659	5,099	1,253
24.	Shree Hanuman Cotton Mills Co. (formerly New Ring Mill Co., Ltd.), Fuleshwar, P.O. Uluberia, Dist. Howrah.	Messrs. Partabmul Rameshwar & Nursing & Co., Owners, 46 Strand Road, Calcutta. (Receiver Madanlal Jaju, Esq.).	24,196	...	...	...	...	...
25.	Shree Radha Krishna Cotton Mills, Ltd., Mill No. 1 (formerly Goosery Cotton Mills) (in liquidation), 122, Old Ghusery Road, Howrah.	Messrs. Sadhuram Tularam, Managing Agents, 29A Sir Hariram Goenka Street, Calcutta 7.	23,232	...	...	...	...	...
26.	Shree Radha Krishna Cotton Mills, Ltd., Mill No. 2 (formerly Jajodia Cotton Mills, Ltd.), 175, Girish Ghosh Road, Belur, Howrah, Dist.	do.	18,732	...	564	...	...	...

27.	Shree Radhesyam Mills, Ltd. (formerly Bharat Abhyuday Cotton Mills, Ltd.), 220, Naskarpara Road, Ghusury, Howrah.	Messrs. Sobharam Keshardeo, Mg. Agents, 135 Canning Street, Calcutta.	30,592 *14,774*	24,441	417	398	4,573	1,451
28.	Siddheswari Cotton Mills, Anantapur, Howrah.	Messrs. Manna Mondal and Mullick, Co., Owners, Office on Mill premises.	...	...	112	108	...	123
29.	Sri Annapurna Cotton Mills, Ltd., Shamnagar, 24 Parganas.	Messrs. Chakravarti, Mukherjee & Co., Mg. Agents, 214 Cross Street, Calcutta.	9,184	7,100	...	...	659	214
30.	Sri Durga Cotton Spg. and Wvg. Mills, Ltd., Konnagar (E.I. Ry.).	Messrs. Choudhury & Co., Ltd., Agents, 23 Hurrochunder Mullick Street, Hatkola, Calcutta.	6,228	5,350	220	206	997	398
31.	Swadeshi Industries, Ltd., Panihatti ...	Messrs. Anandram Gajadar, Mg. Agents, 33 Netaji Subhas Road, Calcutta.	...	...	151	107	...	263
32.	Victoria Cotton Mills, Ghoosery, Salkia, P.O. Howrah District.	Messrs. Partabmull Rameswar and Nursing & Co., Agents, 46 Strand Road, Calcutta. (Receiver Mr. Madanlal Jaju.)	12,304	12,304	...	...	116	350
33.	Vidyasagar Cotton Mills, Ltd., Sodepur, Dist. 24 Parganas.	Messrs. United Commercial Agency, Ltd., Agents, 11 Calootola Street, Calcutta.	...	...	160	138	...	226
		Total ...	4,18,161 *14,774*	3,15,915	9,362	7,778	54,211	19,593
	EAST PUNJAB AND DELHI							
1.	Birla Cotton Spinning and Weaving Mills, Ltd. formerly Hanoman and Mahadeo S. and W. Mills), Subzimundi, Delhi.	Messrs. Birla Bros., Ltd., Agents, 8 Royal Exchange Place, Calcutta.	39,896	38,215	998	991	13,718	2,163
2.	Dayalbagh Spg. and Wvg. Mills (formerly Benkateswar Cotton Mill, Ltd.), Putligarh, G.T. Road, Amritsar.	Sir Sahabji Maharaj Mills, Ltd., Proprietors, Office on Mill premises.	...	...	252	50	...	145
3.	Delhi Cloth and General Mills Co., Ltd., Mill No. 1, Rohtak Road, Delhi.	Lala Bharat Ram Mg. Director, Bara Hindu Rao, P.B. No. 1039, Delhi.						
4.	Delhi Cloth and General Mills Co., Ltd., Mill No. 2, Rohtak Road, Delhi.	do.	75,604	72,423	1,830	1,797	25,598	2,384
5.	Delhi Cloth and General Mills Co., Ltd., Mill No. 3, Rohtak Road, Delhi.	do.						
6.	Delhi Swatantra Bharat Mills, Najafgarh Road, Delhi.	do.	25,680	25,061	608	606	12,272	822
7.	Goenka Cotton Spinning and Weaving Mills Co., Ltd., Grand Trunk Road, Delhi.	Messrs. Parsram Harnandrai, Mg. Agents, Khatra Tobacco, Khari Baoli, Delhi.	...	...	307	...	...	...

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
8. Lakhmi Chand Jaipuria Mills (Mahabir Cotton Spinning & Weaving Co., Ltd., Leaseholders), Subzimundi, Delhi.	R. S. Seth Ram Cowar Jaipuria, Owner, Office on Mill premises.	14,712 *4,788*	6,625	226	120	1,269	433
9. Punjab Cloth Mills, Ltd., Bhiwani (Dist Hissar).	Mr. Radhakrishen Puranmal, Managing Director, Bhiwani.	11,000	8,643	255	212	2,492	521
10. Seth Spinning, Ltd. (formerly Amritsar Spg Mills), G. T. Road, Amritsar.	Messrs. Chunilal Seth & Bros., Ltd., Mg. Agents, Office on Mill premises.	4,648	1,188	39	30	224	64
11 Technological Institute of Textiles (formerly Bhiwani Cloth Mills, Ltd.), Bhiwani.	Birla Education Trust, Agents, Pilani (Jaipur).	15,572	14,291	426	392	4,845	823
	Total ...	1,87,112 *4,788*	1,66,446	4,941	4,198	60,418	7,355
UTTAR PRADESH							
1. Atherton Mills, Anwarganj, Kanpur ...	Messrs. Atherton West & Co., Ltd., Owners, Post Box No. 67, Kanpur.	42,352	41,726	898	898	6,878	1,462
2. Benares Cotton and Silk Mills, Ltd., Chowkaghat, Benares Cantonment.	Messrs. Sital Prasad Kharag Prasad, Mg. Agents, Office on Mill premises.	21,752 *1,360*	20,814	503	317	1,066	854
3. Bijli Cotton Mills. Ltd., Hathras (formerly Tulsidas Tejpal Mills, Ltd.), Sasni Gate, Mendu Road, Hathras City.	Messrs. N. K. Ltd., Mg. Agents, Freeganj, Agra.	13,492	11,508	20	...	6,013	608
4. Cawnpore Cotton Mills Co. (C.C.M.), Cooperganj, Kanpur.	The British India Corporation, Ltd., Owners, Post Box No. 3, Kanpur.	36,656 *7,200*	43,810	972	967	} 16,021	2,368
5. Cawnpore Cotton Mills Co. (Juhi), Juhi, Kanpur.	do.	... *26,352*	26,229	...	...		687
6. Cawnpore Textiles, Ltd., Cooperganj, Kanpur.	Messrs. Begg Sutherland & Co., Ltd., Mg. Agents, Sutherland House, Kanpur.	27,388	23,211	591	505	6,036	773
7. Dayalbagh Textile Mills, Ltd., Dayalbagh, Agra.	Messrs Social Security and Service Corporation, Ltd., Agents, Dayalbagh.	...	...	72	18	...	32

8.	Elgin Mills Co., Ltd., Civil Lines, Kanpur.	Messrs. Begg Sutherland & Co., Ltd , Mg. Agents, Sutherland House, Kanpur.	40,112 *12,540*	48,536	1,198	1,126	16,890	2,340
9.	Indra Spg. and Wvg Mills (formerly Agra Spg. and Weaving Mills Co., Ltd.), Jeoni ka-Mandi, Agra.	Seth Suganchand, Owner, Office on Mill premises	1,200 *12,720*	12,534	...	...	1,259	324
10.	John's Mills Co. (formerly John's Corporation Spg. Mill), Jeoni-ki-Mandi, Agra.	Messrs. M. B Tavakley & P. S. Mathur, Receivers & Managers, Office on Mill premises.	... *51,360*	...	...	...	...	...
11.	John's Mills Co. (formerly John's Princess of Wales Spinning Mill), Jeoni-ki-Mandi, Agra.							
12.	John's Mills Co (formerly John's Spg. Mill), Jeoni-ki-Mandi, Agra.							
13.	J. K. Cotton Manufacturers, Ltd., Kalpi Road, Kanpur.	Messrs. J. K. Commercial Corpn., Ltd., Managing Agents, Kamla Tower, Kanpur.	22,400	21,509	30	27	4,761	345
14.	Juggilal Kamlapat Cotton Spg. and Wvg. Mills Co , Ltd., Kalpi, Kanpur.	Sir Padampat Singhania, Mg. Director, Kamla Tower, Kanpur.	44,964	43,482	895	859	8,244	1,647
15.	Kanauj Dyeing & Wvg. Mills, Moh. Patanala Kanauj, U.P.	Mr. L. Manilal Benimadhava, Owner, Office on Mill premises.	...	...	58	30	...	74
16	Lakshmiratan Cotton Mills Co., Ltd , Kalpi Road, Kanpur.	Messrs. B. R. Sons, Mg. Agents, Behari Niwas, Kanpur.	39,340 *1,080*	29,781	786	725	5,935	1,006
17.	Lalla Mal Hardeo Dass Cotton Spinning Mill Co., Sadabad Gate, Hathras City, Aligarh District.	Mr. Sheo Pershad, Controller, Office on Mill premises.	6 880 *4,500*	9,560	...	...	424	395
18.	Modi Spg. & Wvg. Mills, Ltd., Modinagar (Meerut).	Messrs. R. B. Gujarmal Modi & Bros., Mg. Agents, Office on Mill premises.	20,000	19,415	504	471	7,572	1,116
19.	Moradabad Spinning and Weaving Mills Co., Ltd., Moradabad.	Lala Hari Raj Swarup, Mg. Director, Post Box No. 30, Moradabad.	5,088 *8,400*	...	...	...	...	...
20.	Muir Mills Co., Ltd., Kanpur	Messrs. Indian Textile Syndicate, Ltd., Agents, 55/155 Generalganj, Kanpur.	66,968 *19,350*	84,050	1,801	1,679	18,163	2,783
21.	Narain Cotton Mill, Bansumandi, Kanpur ...	Messrs. H. Bevis & Co., Proprietors, Post Box No 29, Kanpur.	14,500	...	300	...	...	...
22.	New Victoria Mills Co., Ltd., 14-1, Civil Lines, Kanpur.	Messrs. J. P Srivastava & Sons, Ltd., Secretaries, P.B. No. 46, Kanpur.	48,236	43,473	1,148	1,053	11,369	1,779
23.	Prem Spinning and Weaving Mills Co., Ltd , Ujhani, Hathras.	L. Kailash Chandra Soni, Secretary, Ujhani.	17,600	...	...	...	...	...
24.	Ramchand Spg. and Wvg. Mills (formerly New Ramchand Cotton Mills), Hathras City, Aligarh Dist.	Messrs. Hiralal Gulabchand & Co., Owners, Mursan Gate, Hathras City	16,480 *3,540*	13,469	171	165	3,127	686

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
25. Raza Textiles, Ltd., Jwalanagar, Rampur ...	Sir J. P. Shrivastava & Sons (Rampur), Ltd., Mg. Agents, P.O. Jwalanagar, Rampur.	28,436	24,234	440	425	4,163	1,049
26. Sachendi Cotton Mills, Sachendi	Messrs. Lala Ram Narain Garg, Owners, Garg Bhuwan, Civil Lines, Kanpur.	800 *3,180*	...	...	...	...	...
27. Shri Radha Krishna Mills (formerly Mirzapur Cotton Mills), Narghat, Mirzapur.	Messrs. Sekhsaria Bros., Ltd., Agents, 15 Vivekananda Road, Calcutta.	...	...	74	54	...	82
28. Shri Vikram Cotton Mills, Ltd. (formerly R. G. Cotton Mills Co., Ltd.), Talkatora, Lucknow.	Ranjit Singh & Sons, Ltd., Managing Agents, Talkatora, Lucknow.	17,544	15,147	323	276	6,060	648
29. Swadeshi Cotton Mills Co., Ltd., Juhi, Kanpur.	Messrs. Jaipuria Brothers, Ltd., Agents, Generalganj, Kanpur.	1,12,216 *988*	1,04,137	1,979	1,932	25,176	3,730
	Total ...	6,44,404 *1,52,570*	6,36,625	12,763	11,527	1,49,157	24,788
MADRAS STATE							
1. Aaron Spinning and Weaving Mills, Ltd., Pappinisseri, North Malabar.	Mr. C. Samuel Aaron, Mg. Director, Office on Mill premises.	12,300	11,824	374	336	1,463	546
2. Asher Textiles, Ltd., Avanashi Road, Tiruppur.	Messrs. Textile Corporation, Ltd., Mg. Agents, Office on Mill premises.	20,000	14,761	...	...	1,669	298
3. Balakrishna Mills, Ltd., 47, East Madura Station Road, Mathurai.	Mr. A. H. S. Ramaswamy Iyer & Sons, Office on Mill premises.	...	...	83	78	...	74
4. Buckingham and Carnatic Co., Ltd. (Buckingham Mill), Perambur, Madras. 5. Buckingham and Carnatic Co., Ltd. (Carnatic Mill), Perambur, Madras.	Messrs. Binny & Co. (Madras), Ltd., Mg. Agents, 7 Armenian Street, Madras.	1,19,916	1,09,549	2,799	2,759	32,436	8,432
6. Cambodia Mills, Ltd., Singanallur, Coimbatore.	Messrs. Peirce Leslie & Co., Ltd., Managing Agents & Secretaries, Race Course, Coimbatore.	37,536	35,979	4	...	7,165	417

7.	Cannanore Spg. & Wvg. Mills, Ltd., Makkat, Cannanore.	Messrs. Malabar Industrial Syndicate, Mg. Agents, Office on Mill premises.	14,400	10,762	...	...	3,342	265
8.	Cauvery Spg. & Wvg. Mills, Ltd., Cauvery Nagar, P.O. Vellanur.	Messrs. United Industries (Pudukkottai), Ltd., Mg. Agents, Office on Mill premises.	11,616	5,818	...	...	617	162
9.	Coimbatore Cotton Mills, Ltd., Singanallur, Coimbatore.	Messrs. R. Beema Naidu & Co., Mg. Agents, Office on Mill premises.	28,864	27,808	...	...	4,245	580
10.	Coimbatore Kamala Mills, Ltd, Singanallur, Coimbatore.	Messrs. R V. Lakshmiah Naidu & Co, Agents, Office on Mill premises.	16,400	13,896	...	...	1,293	280
11.	Coimbatore Murugan Mills, Ltd., Mettupalayam Road, Coimbatore.	Messrs. T. A. Ramalingam Chettiar Sons & Co., Agents, Office on Mill premises.	19,460	17,893	...	...	2,348	381
12.	Coimbatore Pioneer Mills, Ltd., Peelamedu, Coimbatore.	Messrs. T. R. Narayanaswami Naidu & Co., Agents, Coimbatore.	19,700	19,207	...	...	1,837	363
13.	Coimbatore Spinning and Weaving Co., Ltd., Mill Road, Coimbatore.	Messrs. R. G. S. Naidu & Co, Secretaries & Agents, P.B. No. 24, Coimbatore.	72,188	65,721	407	387	6,877	1,704
14.	Commonwealth Weaving Factory, Cannanore, Malabar	The Commonwealth Trust, Ltd, Owners, Kozhikode (Malabar).	...	...	312	308	...	472
15.	Dawood Mills Ltd., Tiruchi Road, Pudukottai.	Mr. G. V. Muthuswamy Naidu, Mg. Agent, 4 Redfields, Coimbatore.	3,616	2,938	...	...	88	77
16.	Dhanalakshmi Mills, Ltd., Uthukuli Road, Tirupur.	Messrs. M. Nanjappa Chettiar & Sons, Mg. Agents and Secretaries, Tirupur.	29,500	28,061	201	173	3,229	795
17.	Gnanambikai Mills, Ltd., Vellakinar, Coimbatore.	Messrs. V. C. Vellingiri Gounder & Bros., Managing Agents, Vellakinar House, Vellakinar Post, Coimbatore.	11,200	10,508	...	...	2,091	278
18.	Hemalata Textiles, Ltd., Pedakakani, Guntur Dist.	Messrs. Sudarsanam, Ltd., Mg. Agents, Ralli House, 320 Linghi Chetty Street, Madras.	12,000	8,600	...	...	1,572	325
19.	Janakiram Mills Ltd., Srivilliputhur Road, Rajapalayam.	Messrs. Shakthi, Ltd., Mg. Agents, Office on Mill premises.	...	...	70	70	...	95
20.	Janardana Mills, Ltd., Uppilipalayam, Singanallur.	Messrs. G. Venkataswami Naidu & Co, Agents, Office on Mill premises.	20,760	19,703	...	...	2,117	467
21.	Jawahar Mills, Ltd., Sevapet, Salem Junction, Sooramangalam Main Road.	Messrs. Umayambika & Co., Mg. Agents, Jawahar Mills Post, Salem Junction.	29,872	25,403	...	...	2,768	524
22.	Jayalakshmi Mills, Ltd., Uppilipalayam, Singanallur.	Mr. R. Venkataswami Naidu, Mg. Director, Office on Mill premises.	8,344 *1,936*	4,505	...	...	962	110

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candics of 784 lbs	Average Number of Hands employed daily.
23.	Jayanthi Ramchandrappa Setty Mills, Ltd., Rayadrug, Bellary Dist.	Mr. J. Venkataramanappa Setty, Mg. Director, Office on Mill premises.	...	...	51	51	...	124
24.	Jayaram Mills, Ltd , Rajapalayam, Ramnad Dist.	Messrs. Ramco. Management, Ltd., Agents, Office on Mill premises.	1,720	...	81	66	...	121
25.	Kadri Mills, Ltd., Oddarpalayam, Singanallur.	Messrs. G. Krishna & Co., Mg. Agents, Office on Mill premises.	13,464	12,701	...	...	1,802	316
26.	Kaleeswarar Mills, Ltd., Annuperpalayam, Coimbatore.	Messrs. A. L. A. R. Arunachalam Chettiar & Dewan Bahadur P. Somasundaram Chettiar, Agents, Office on Mill premises	50,612	43,480	295	287	5,933	1,259
27.	Kandan Textiles, Ltd., Thiruvottiyur, Madras.	Messrs. C. S. & Co., Mg. Agents, 8 Second Line Beach, Madras.	...	...	76	57	...	77
28.	Karthikeyan Mills, Ltd., Viravanallur, Tirunelveli District.	Messrs. A. R. M. Velayutha Mudaliar & Co., Ltd., Mg. Agents, 4/92 Main Road, Ambasamudram.	5,816	1,750	...	...	194	72
29.	Kasthuri Mills, Ltd., Irugur Village, Singanallur, Coimbatore.	Messrs. C. N Venkatapathy Naidu & Co., Ltd., Agents, Office on Mill premises.	14,700	13,611	...	...	1,145	308
30.	Kothari Textiles, Ltd., Singanallur, Coimbatore.	Messrs Kothari & Sons, Mg. Agents, Oriental Buildings, Armenian Street, Madras.	13,824	13,392	...	...	1,587	268
31.	Kulapuram Spg. & Wvg. Mills, Ltd. (formerly Kulapuram Wvg. Establishment), P.O. Mandur (*Via* Payangadi), N. Malabar.	Mr. Wesley Aaron, Mg. Director, Office on Mill premises.	...	...	72	65	...	105
32.	Kumaran Mills, Ltd., Puduppalayam, Idigarai Post, Coimbatore.	Messrs. N. Appuswamy Naidu & Co., Agents, Peelamedu, Coimbatore.	8,016	7,001	...	...	750	178
33.	Lakshmi Mills Co., Ltd., Mill No 1, Pappanaickenpalayam, Avanashi Road, Coimbatore.	Messrs. G. Kuppuswami Naidu & Co., Office on Mill premises.	42,368	38,982	200	199	4,029	808
34.	Lakshmi Mills Co., Ltd., Mill No. 2, Koilpatty.	do.	25,056	21,268	...	...	3,870	441

35.	Lotus Mills, Ltd., Sundarapuram, Podanur ...	Messrs. Lotus Agency, Ltd., Agents, Office on Mill premises.	18,040	16,266	...	...	3,024	392
36.	Loyal Textile Mills, Ltd. (formerly Loyal Mills, Ltd.), Kovilpatti	Messrs. Southern Agencies, Ltd., Mg. Agents, 2/21 First Line Beach, Madras.	24,242	23,305	224	223	5,079	710
37.	Madras Spg. and Wvg. Mills Co., Ltd. (formerly Madras United Spg. and Wvg. Mills), Madras.	Messrs. Khandeish Spg. & Wvg. Mills Co., Ltd., Secretaries & Agents, Cambatta Building, 42 Queen's Road, Fort, Bombay.	40,164	...	774	...	...	...
38.	Madura Mills Co., Ltd., Madura (Old and New), Madura.	Messrs. A. & F. Harvey, Ltd., Managers, Madura.	2,30,904	2,18,735	...	...	42,085	7,283
39.	Madura Mills Co., Ltd., Tuticorin (formerly Coral Mills Co., Ltd.), Tuticorin.	do.	60,380	54,921	...	...	18,229	2,492
40	Madura Mills Co., Ltd., Ambasamudram (formerly Tinnevelly Mills Co., Ltd.), Ambasamudram.	do.	1,40,736	1,25,834	...	...	30,498	4,780
41.	Madura Mills Co., Ltd. (Pandyan Mills, Madura), Madura East.	do.	33,304	28,395	...	...	7,607	1,053
42.	Mahalakshmi Textile Mills, Ltd., Madura ...	Messrs. S. S. N. Lakshmanan Chettiar & Co., Mg. Agents, Pasumalai, P.O. Madura.	22,212	21,920	...	...	2,653	603
43.	Malabar Spinning & Weaving Co., Ltd., Kallai, Malabar.	Messrs A. L A R. Somanadhan Chettiar, Srimathi S. Seethai Achi & A. K. T. K. M. Narayanan Namboodripad, Agents, Kallai.	21,856	18,995	...	...	1,988	428
44.	Mettur Industries, Ltd., Mettur Dam ...	Messrs. W. A. Beardsell & Co., Ltd., Agents, Post Box No. 7, Madras.	24,252	24,252	603	603	6,016	838
45.	Palani Andavar Mills, Ltd., Dhali Road, Udamalpet.	Messrs. Bhagyalakshmi & Co., Mg. Agents, Office on Mill premises.	22,800	20,323	...	...	3,188	481
46.	Pankaja Mills, Ltd., Puliakulam, Coimbatore.	Messrs. C. S. Ratnasabapathy Mudaliar & Sons, Mg. Agents & Secretaries, P.B. No. 150, Coimbatore.	27,980	25,323	...	...	3,825	738
47.	Pollachi Bagyalakshmi Mills, Ltd., Pollachi, S. Ry. Coimbatore Dist.	S. R. M. Ramaswamy Chettiar, S. R. M. Sathppa Chettiar, Mg Directors, 40 Balagopalapuram, Pollachi.	8,424	3,969	...	...	158	81
48.	Premier Mills (C.B.E.), Ltd., Pulankinair, P.O. Udamalpet.	Messrs Narayanaswamy Naidu & Co., Mg. Agents, Office on Mill premises.	9,504	7,755	...	...	970	173
49.	Pudukotah Textiles, Ltd., Namanasamudram, S. Ry.	Messrs. Emceta & Sons (Pudukotah), Ltd., Mg. Agents, Bedford House, Vepery, Madras.	12,112	8,556	126	119	1,172	308

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
50.	Pullicar Mills, Ltd., Tiruchengode, Salem Dist.	Messrs. V. V. C. R. Viapuri Mudaliar & Sons, Agents, Tiruchengode.	12,900	11,663	...	...	1,683	247
51.	Radhakrishna Mills, Ltd., Peelamedu, Coimbatore.	Messrs. A. G. Guruswami Naidu & Co., Mg Agents, Office on Mill premises.	36,464	33,034	...	...	5,365	783
52.	Raja Mills, Madura	Mr. M. V. P. Kanagavel Nadar, Owner, Office on Mill premises.	8,080	7,862	...	...	1,303	235
53.	Rajalakshmi Mills, Ltd., Tiruchi Road, Singanallur, P.O. Coimbatore.	Messrs. B. Rangaswami Naidu & Sons, Mg. Agent, Office on Mill premises.	25,896	22,575	...	...	3,657	641
54.	Rajapalayam Mills, Ltd., Rajapalayam, Ramnad Dist.	Ramco Agencies, Ltd., Mg. Agents, Post Box No. 1, Rajapalayam.	18,020	16,056	...	...	2,400	421
55.	Rajeswari Mills, Ltd., Rly. Station Road, Gudiyattam.	Messrs. Gudiyattam Textiles, Ltd., Mg. Agents, Office on Mill premises.	6,400	5,072	12	...	216	93
56.	Rayalaseema Mills, Ltd., Rayanagar, Adoni P.O., Bellary Dist.	Messrs. Rayalaseema Development Co., Mg Agents, Office on Mill premises.	12,000	11,362	...	...	3,439	431
57.	Sankar Mills, Chatram, Pudukulam, Tirunelveli, Tinnevelly Dist.	S. S. Pillai & Sons, Proprietors, Mada Street, Tirunelveli Town.	...	...	101	73	...	81
58.	Saroja Mills, Ltd., Singanallur, Coimbatore ...	Messrs. Thiagaraja Chetty & Sons, Ltd., Mg. Agents, Office on Mill premises.	14,256	13,377	...	...	1,572	288
59.	Shree Venkatesa Mills, Ltd., Udamalpet, Coimbatore Dist.	Messrs. G. V. Govindaswami Naidu & Co., Mg. Agents, Office on Mill premises.	38,860	38,268	268	246	3,354	720
60.	Somasundaram Mills, Ltd. (formerly Coimbatore Mall Mills), 270, Mill Road, Coimbatore.	Mr. S. Lakshmanan Chettiar, Mg. Agent, Post Box No. 134, Coimbatore.	23,200	16,636	378	308	2,664	673
61.	Soundararaja Mills, Ltd., Power House Road, Dindigul.	Messrs. Lakshmana & Co., Mg. Agents, Office on Mill premises.	12,800	12,139	...	...	1,697	337
62.	Sree Meenakshi Mills, Ltd., Thirupparankundram Road, Madura.	Messrs. Thiagaraja Chetty & Co., Mg. Agents, Office on Mill premises.	37,204	35,585	144	101	6,697	1,227

63.	Sree Rajendra Mills, Ltd. (formerly Salem Rajendra Mills, Ltd.), Gandhi Nagar, Salem.	Messrs. Thiagaraja Chetty & Co., Ltd., Agents, Meenakshi Nilayam, Tiruppurankundram Road, Madurai.	17,200	16,166	...	...	2,704	481
64.	Sree Shunmugar Mills, Ltd., Rajapalayam, Ramnad District.	Messrs. Sree Alagai, Ltd., Mg. Agents, Saraswathi Niwas, Sivagamipuram Street, Rajapalayam.	5,424	4,743	...	...	1,160	185
65.	Sree Suryanarayana Spg. & Wvg. Mills, Pandalapaka, E. Godavery District.	Mr. Vundavilli Satyanarayanamurty, Mg. Director, Office on Mill premises.	5,584	4,824	...	...	489	215
66.	Sri Balasubramania Mills, Ltd., Singanallur, Coimbatore.	Messrs. K. Krishnaswami Naidu & Bros., Agents, Office on Mill premises.	12,096	12,096	...	...	1,433	389
67.	Sri Ganapathi Mills Co., Ltd., Chatram, Pudu-ladam, Tirunelveli.	Messrs. S. S Pillai & Sons, Ltd., Mg. Agents, 36 East Car Street, Tirunelveli.	6,000	1,928	...	...	69	26
68.	Sri Kannapiran Mills, Ltd.	Messrs. K. Venkataswami Naidu & Co., Mg. Agents, 5/21 Gopalapuram, Coimbatore.	7,004	5,115	...	...	763	136
69.	Sri Karthikeya Spg & Wvg Mills, Ltd., Uppilipalayam, Singanallur.	Mr. G. Ramaswamy Naidu, Governing Director, Office on Mill premises.	10,912	10,256	...	...	1,172	179
70.	Sri Kothandram Mills (Weaving), Venkatapaty Iyengar Street, Ramnad Road, Madura	Messrs. S. S. Ramudu Iyer & Bros., Owners, 272, Ramnad Road, Madura.	...	...	82	81	...	95
71.	Sri Kothandram Mills (Spinning), Chintamani Rubbish Depot Road, Mahalipatti, Madura	do.	4,000	3,963	...	...	898	189
72.	Sri Palamalai Ranganathar Mills, Ltd., Perianaickenpalayam P.O., Coimbatore District.	Messrs. S. K. Rangaswami Naidu & Co., Mg. Agents, Office on Mill premises.	6,472	5,214	...	...	946	160
73.	Sri Ramachandra Spg. & Wvg. Mills, Pandalapaka, E. Godavery District.	Messrs. D. Subbireddi, K. Bhamireddi and U. Chellama, Proprietors, Office on Mill premises.	7,044	5,828	...	...	213	250
74.	Sri Ramalinga Choodambikai Mills, Ltd., Uthukuli Road, Tirupur.	Messrs. S. Kulli Chettiar & Bros., Mg. Agents, 60/10 Uttukuli Road, Tirupur.	13,124	12,941	...	...	2,103	346
75.	Sri Ranga Vilas Ginning, Spg. and Wvg. Mills, Ltd., Peelamedu, Coimbatore.	Messrs P. S. Govindaswami Naidu & Sons, Mg. Agents, Office on Mill premises.	28,972	28,255	88	76	3,118	633
76.	Sri Sarada Mills, Ltd., Loganathapuram, Podanur, Coimbatore.	Messrs. V. S Sengottaiah & Bros., Mg. Agents, Bakthi Vilas, Jail Road, Coimbatore.	20,472	14,801	200	146	1,543	344
77.	Sri Satyanarayana Spinning Mill, Rajahmundry, Godavery District.	Rao Saheb Vallbhaneni Bapayya Chowdary, Proprietor, Rajahmundry.	5,504	4,560	...	...	486	200
78.	Thaikesar Alai (Branch of Shree Meenakshi Mills, Ltd., Madura), Koilpatti Road, Manaparai, P.B, No. 1.	Messrs. The Sree Meenakshi Mills, Ltd., Proprietors, P.B. No. 1, Madura.	21,600	21,481	...	...	3,103	523

	NAMES OF MILLS.	AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
79	Thirumagal Mills, Ltd., Gudiyattam, North Arcot	Messrs. Thirumal & Co., Ltd., Agents, Office on Mill premises.	14,500	9,051	...	...	1,387	299
80	Tirumurti Mills, Ltd, Bodipatti, Udamalpet, Coimbatore Dist.	Messrs. Jayalakshmi & Co., Agents, Office on Mill premises.	16,400	12,568	...	...	1,332	258
81.	Trichinopoly Mills, Ltd., Ramjinagar, Manapparai Road, Trichinopoly.	Messrs. Mooljee Ramjee & Sons, Ramjee Nagar, Trichinopoly.	16,000	15,089	...	...	1,646	272
82	Tuticorin Spg. Mills, Ltd., Palayamkottai Road, Tuticorin.	Mr A. M. Chinvawani, Mg. Director, Office on Mill premises.	6,000	...	...	...	...	...
83	Vasanta Mills, Ltd, Singanallur, Coimbatore.	Messrs. R. K. Shanmukham Chetty & Bros., Managing Agents and Secretaries, Office on Mill premises.	33,704	31,231	270	257	4,379	889
84.	Vijay Kumar Mills, Ltd., Kalayamputhur, Palni, S. I. Rly.	Messrs. R. Guruswami Naidu & Co., Mg. Agents, Office on Mill premises.	13,440	6,941	...	...	234	...
85.	Vijyalakshmi Mills, Ltd. (formerly Vysya Mills, Ltd.), Kuniayamuthur, Coimbatore.	Messrs. Gupta & Co., Ltd., Agents, Office on Mill premises.	14,552	10,082	...	...	1,259	297
		Total ...	18,92,242 *1,936*	16,44,429	8,295	7,069	2,86,405	53,625
	COCHIN AND TRAVANCORE							
1.	A D. Cotton Mills, Ltd., Quilon	Messrs. Girdharlal Amratlal & Co, Mg. Agents, Office on Mill premises.	12,000	10,525	300	265	1,635	440
2.	Alagappa Textiles (Cochin), Ltd. (Alagappa Textiles), Alagappanagar (Cochin State).	Messrs. Ramal & Co., Ltd., Mg. Agents, Alagappanagar, P.O. (Cochin State).	44,306	26,773	...	...	3,764	1,199
3.	Alagappa Textiles (Cochin), Ltd. (Cochin Textiles), Alagappanagar (Cochin State).							
4.	Alwaye Textiles, Ltd., Alwaye	Messrs. Shankar Agencies, Ltd., Mg. Agents, Alwaye.	5,496 *1,008*	...	10	...	...	...

5.	Asoka Textiles, Ltd., Alwaye	Managed by Board of Directors, Alagappanagar P.O.	8,640	4,076	...	...	248	135
6.	Balarama Varma Textiles, Ltd., Shencottah.	Messrs. Karayaldar & Rangaswami Naidu Sons Co., Mg. Agents, Office on Mill premises.	11,904	10,757	...	...	873	223
7.	Cochin Mahalakshmi Cotton Mills, Ltd., Mulakunnathukavu, Cochin State.	Messrs. Cochin Agencies & Industries, Ltd., Mg. Agents, Office on Mill premises.	3,000	2,032	...	...	350	110
8.	Sitaram Spg. and Wvg. Mills, Ltd., Trichur, Cochin State.	Messrs. T. R. Anantharama Iyer & Bros., Ltd., Mg. Agents, Pushpagiri, Trichur.	17,216	15,944	416	401	3,114	822
9.	Vanaja Textiles, Ltd., Ponganamkadu, Ramvarmapuram, P.O. Trichur.	Messrs. Mayura Co., Ltd., Mg. Agents, Umalayam, Kuruppam Road, Trichur.	8,400	2,700	...	...	41	120
10.	Vijayamohini Mills, Ltd., Thirumala Poojapura, Trivandrum.	Messrs. Binsuram & Co., Mg. Agents, Office on Mill premises.	9,360	8,222	...	...	1,903	253
		Total ...	1,20,322 *1,008*	81,029	726	666	11,928	3,302
	MYSORE							
1.	Bangalore Woollen, Cotton and Silk Mills Co., Ltd., Agraram Road, Bangalore City.	Messrs. Binny & Co., (Madras), Ltd., Secretaries, Treasurers & Agents, 7 Armenian Street, Madras.	40,068	38,582	1,085	1,070	9,729	4,121
2.	Davangere Cotton Mills, Ltd., Devangere ...	Messrs. R. Hanumanthappa & Son, Mg. Agents, Hanumanthappa Bldg., Chitaldrug Road, Davangere.	21,328	17,118	...	...	4,596	743
3.	Kapila Textiles Mills, Ltd., Nanjangud Town.	Messrs. C. P. C. & Co., Mg. Agents, Gandhi Square, Mysore.	15,184	2,832	...	...	140	243
4.	Minerva Mills, Ltd., Bangalore City ...	Messrs. N. Sirur & Co., Ltd., Mg. Agents, Temple Bar Building, 70 Forbes Street, Fort, Bombay.	36,416	33,501	551	468	8,094	1,621
5.	Mysore Spinning and Manufacturing Co., Ltd., Venkatarangaiengar Road, Malleshwaram, Bangalore City.	do.	49,696	46,135	500	487	9,973	2,455
6.	Shree Ganesar Textile Mills, Ltd., Davangere.	Messrs. G. Mahadevappa & Sons, Mg. Agents, Office on Mill premises.	17,000	5,326	...	...	980	202
7.	Sri Krishnarajendra Mills, Ltd., Bangalore Road, Mysore.	Mr. H. Nanjundia, Chairman & Mg. Director, Office on Mill premises.	25,200	22,467	285	264	4,536	1,143
8.	Sri Krishna Weaving Mills, Subramanyapura, Kengeri Post, Uttanhalli.	Messrs. Yadalam Subbiah Setty & Sons, Mg. Agents, P.B. 24, Bangalore City.	...	...	174	168	...	399

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
9. Sri Shankara Textile Mills, Ltd., Davangere ...	Messrs. Murugharajendra & Company, Post Box No. 2, Davangere.	18,000	12,361	...	...	2,415	507
10. Shree Suryodaya Mills (formerly Bangalore Spg. & Wvg. Mill), Yeshvantpur, Bangalore City.	Messrs R. Rama Setty Mg. Director, Office on Mill premises.	...	...	73	73	...	224
11. T. R. Mills, Chamarajpet, Bangalore City ...	D. R. Madhava Krishnaiya, Owner, Office on Mill premises.	...	...	208	125	...	212
	Total ...	2,22,892	1,78,322	2,876	2,655	40,463	11,870
PONDICHERRY							
1. Anglo-French Textile Co., Ltd. (Rodier Mill), Pondicherry.	Messrs Best & Co., Ltd., Mg. Agents, Office on Mill premises.	44,256	42,705	1,000	692	9,719	3,282
2. "Savana" Societe Anonyme de Filature et Tissage Mecanique, Savana (Inde-francaise), Pondicherry.	Mr. Marcel Valot, General Manager, Office on Mill premises.	22,968	22,875	675	672	6,207	1,792
3. Sri Bharathi Mills, S.A. (formerly Establishment Textile De Modeliarpeth S.A.), Modeliarpet, Pondicherry.	Messrs. Establishment Textile de Modeliarpeth, Mg. Agents, P.O. Box No. 10, Pondicherry.	16,316	10,092	316	297	1,753	1,003
	Total ...	83,540	75,672	1,991	1,661	17,679	6,077
	GRAND TOTAL ...	1,09,80,019 *2,60,616*	97,98,260	2,01,484	1,83,045	18,43,577	4,25,032

COTTON MILLS IN PAKISTAN

No.	Mill	Agents / Proprietor						
	SIND							
1.	Daulatram Spg. & Wvg. Mills (formerly Sind Textile Mills), New Jail Country Club Road, Karachi.	Jamnadas Ibji Dutia, Esq., Proprietor, Country Club Road, Karachi.						
	EAST BENGAL							
1.	Acharya Prafulla Chandra Cotton Mills, Ltd., (formerly Sind Textile Mills), Khulna.	Messrs. Bengal Workers' Association, Ltd., Mg. Agents, 3 Madan Street, Calcutta.	...	...	110	90	...	189
2.	Adarsha Cotton Spg. & Wvg. Mills, Ltd., Narayanganj, Dacca.	Messrs. S. K Basu & Sons, Ltd., Mg. Agents, 41 Chowringhee Rd., Calcutta.	3,732	3,101	...	...	337	114
3.	Bagerhat Co-operative Weaving Union, Ltd., Bagerhat, E. Bengal.	Messrs. Bengal Provincial Co-operative Bank, Ltd., Mg. Agents, 3/2 Dalhousie Square East, Calcutta.	...	...	50	35	...	55
4.	Bandhab Sugar & Cotton Mills, Ltd., Charsidur.	Messrs. Mono Mohan Shah, etc., Mg. Agents, Amalpura, Narayanganj.	1,300	970	...	...	65	58
5.	Chittaranjan Cotton Mills, Ltd., Narayanganj, Dacca.	Shri D. N. Bose, Mg. Director, 4 Simpson Road, Calcutta.	9,720	8,944	151	151	1,641	584
6.	Dacca Cotton Mills, Ltd., Postgollah, P.O. Faridabad, Dacca.	Messrs. Gajraj Madanlal, Ramesh Chandra Jogish Chandra Das, Mg. Agents, Office on Mill premises.	4,500	2,200	124	114	600	397
7.	Dhakeswari Cotton Mills, Ltd., Mill No. 1, Dhamgarh, Narayanganj, Dacca.	S. K. Basu, Esq., Mg. Director, 24/25 Srisdas Lane, Sangattola, Dacca.	28,836	24,238	778	608	4,272	1,457
8.	Dhakeswari Cotton Mills, Ltd., Mill No. 2, Godnyle, Narayanganj, Dacca.	do.	21,280	16,940	511	343		1,036
9.	Jadev Spg. Mills, Pabna.	... ...	250	...	8	...	...	...
10.	Luxminarayan Cotton Mills, Ltd., Godnyle, Narayanganj, Dacca.	Messrs. The Dacca National Agency, Ltd., Mg. Agents, 3 Johnson Road, Dacca and also 4B Gartion Place, Calcutta.	9,420	6,955	252	226	1,199	718
11.	National Cotton Mills, Ltd., Halisahar, Chittagong.	The Chittagong Commerce & Industries, Ltd., Mg. Agents, Station Road, Chittagong.	5,676	3,458	120	90	659	222
12.	Mohoni Mills, Ltd. (Mill No. 1), Kushtia ...	Messrs. Chakravarti Sons & Co., Managing Agents, 22 Canning Street, Calcutta.	19,288	18,238	527	520	2,494	1,077

	NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND *OFFICE ADDRESSES.*	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity of cotton consumed during the year in candies of 784 lbs.	Average Number of Hands employed daily.
13.	Olympia Textile Mills (formerly Luxmi Spinning and Weaving Mills), Ltd., Narayanganj, Dacca.	Mr. Nazir Hussain Mannoo, Partner, Office on *Mill* premises.	2,700	2,700	...	...	566	150
14.	Abbasi Textile Mills	Messrs. Ali & Roberts, Bhawalpur), Ltd., Agents, Rehimyar Khan (Bhawalpur State).	31,800	...	...	...	...	...
15.	Colony Textile Mills	Agents, 69 Napier Road, Multan.	20,400	...	...	...	...	...
16.	Dyer Textile Printing Mills	Jodia Bazar, Daryalal St., Karachi.	5,000	...	100	...	...	...
17.	Ghafoor Textile Mills	Agents, Top Floor, Sind Market, Karachi.	2,000	...	...	...	...	...
18.	Government Demonstration Weaving Factory, Shadra, Lahore.	... ...	...	...	110	...	...	...
19.	Kohinoor Textile Mills, Kohinoor Nagar *Lyallpur.*	... ...	25,200	...	...	...	...	...
20.	Lyallpur Cotton Mills (Branch: Delhi Cloth & General *Mills, Ltd.*), *Lyallpur.*	Branch of Delhi Cloth and General Mills, Ltd., Delhi.	32,052	30,639	994	994	12,115	1,285
21.	Mela Ram Cotton Mills, Mela Ram Road, Lahore.	Messrs. R. B. Gopal Das & Sons, Ltd., Proprietors and Occupiers, Post Box No. 20, Lahore.	10,916 *5,200*	10,986	148	144	3,226	576
22.	Punjab Cotton *Mills*	*Agents, outside* Batia Gate, Lahore.	16,500	...	148	...	...	...
23.	Punjab Textile Mills, Ltd., P.O. Kot Dunichand, Lahore.	D. D. Puri, Esq., Mg. Director, 2 Fane Road, *Lahore.*	5,040	4,674	...	...	2,967	196
24.	Sutlej Cotton Mills, Ltd., Okara	Messrs. Birla Bros., Ltd., Mg. Agents, 8 Royal Exchange *Place, Calcutta.*	22,800	21,964	925	846	8,835	2,874
25.	Textile Finishing Mills	Agents, Hensaraj Agarwal Bldg., Bhandar Road, Karachi.	1,500	...	...	...	...	...

26.	Valika Textile Mills, Ltd., Sind Industrial Trading Estate, Manghopir Road, Karachi.	Messrs. Vallibhai Kamruddin (Sind), Ltd., Mg. Agents, Valika Chambers, South Napier Road, Karachi.	26,500	20,500	506	480	4,592	550
27.	Zeb-Tun Textiles Mills	Pirwali Gali, Bunder Road, Karachi.	25,200	...	...	...	...	...
		Total ...	3,31,610 *5,200*	1,76,507	5,562	4,641	43,568	11,538

COTTON MILLS IN COURSE OF ERECTION (1951)

	RAJASTHAN							
1.	Shree Bhawani Anand Cotton Mills, Ltd., Bhawanimandi, Rajasthan.	Messrs. Jaipuria Bros. (Rajputana), Mg. Agents, Office on Mill premises.	...	...	...	...	...	...
	UTTAR PRADESH							
1.	Cosmopolitan Cotton Mills Co., Bhurpur, P.O. Karchan.	Messrs. P. C. Banerjee, 2 Liddle Road, George Town, Allahabad.	...	...	...	...	...	...
	MADHYA PRADESH							
1.	Narmada Cotton Mills, Ltd., Dist Jubbulpore.	Messrs. Madhoprasad Manmohandas, Agents, Allahabad.	...	...	300	...	...	...
	MADHYA BHARAT							
1.	Padmavati Raje Cotton Mills, Ltd., Nagda (W. Rly.).		...	...	...	...	...	...
	WEST BENGAL							
1.	Adarsha Cotton Spg. & Wvg. Mills, Ltd., No. 2, Suryanagar, Asansol, P.O. Biernpur.	S. K. Bassu, Mg. Director, 41 Chowringee Road, Calcutta.	...	...	150	...	...	...
2.	Bay of Bengal Textiles, Ltd., Joyrampore, Dist. Nadia.	Messrs. A. Rashid & Co., Mg. Agents, 25-26, Waterloo Street, Calcutta.	...	...	200	...	...	...
3.	Bengal Fine Spinning and Weaving Mills, Ltd., Konnagar (E. I. Rly.).	Messrs. B. C. Nawn & Bros., Ltd., Mg. Agents, 7 Bowbazar Street, Calcutta.	...	...	...	...	...	...
4.	Bengal Textile Mills, Ltd.	Messrs. D. N. Choudhury & Co., Ltd., Mg. Agents, 23 Hurrochunder Mullick Street, Calcutta.	...	...	5,000	...	...	...

NAMES OF MILLS.	NAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES.	Total Number of Spindles installed.	Average Number of Spindles at work daily.	Number of Looms installed.	Average Number of Looms at work daily.	Approximate quantity Average Number of Hands employed daily.	Average Number of Hands employed daily.
5. Bijoy Cotton Mills, Ltd.	Messrs. Himatsingka & Sons, Ltd., Mg. Agents, 6 Old Post Office Street, Calcutta.	...	...	...	...	...	...
6. Dhaleswari Textiles, Ltd., Near Asansol West Bengal.	Messrs. G. K. Ghosh & Co. (Textiles), Ltd., Mg. Agents, Norton Bldgs., 1 & 2 Old Court House Corner, Calcutta.	...	...	100	...	...	...
7. D. N. Choudhury Cotton Mills, Ltd. ...	Messrs. Choudhury Industries, Ltd., Secretaries & Agents, 23 Hurrochunder Mullick Street, P.O. Hatkhola, Calcutta.	...	...	150	...	...	...
8. Eastern Cotton Mills, Ltd.	Messrs. Traders Syndicate, Mg. Agents, 162 Bowbazar Street, Calcutta.						
9. Howrah Cotton Mills, Ltd., Belgachia, Howrah.	Messrs. A. K. Mondal & Sons, Mg. Agents, 146, Belilious Road, Howrah.	...	...	100	...	...	...
10. Emerald Cotton Mills, Ltd., Shamnagar (B. A. Rly.), 24 Parganas.	Messrs. Century Agencies, Ltd., Agents, P. 7, Mission Row Extension, Calcutta.	...	...	...	...	...	...
11. Sodepore Cotton Mills, Ltd., Sodepore, 24 Parganas.	Messrs. Choudhuri Textiles, Ltd., Agents, 23 Hurro Chunder Mullick Street, Calcutta 5.	...	...	400	...	...	...
12. Young India Mills, Ltd., Konnagon Dist., Hoogly.		...	...	...	...	...	...
MADRAS STATE							
1. Adoni Cotton Mills, Ltd., Alur Road, Adoni, Bellary Dist.	Messrs. Vembu & Sons Co., Mg. Agents, 22 Bell Bldg., Sir P. M. Road, Bombay.	...	...	...	...	...	...
2. Kanakavel Spg. & Wvg. Mills, Ltd., Pudukottai.	... ...	...	...	...	...	...	...
3. Karur Mills, Ltd., Thanthoni, Karur ...	Messrs. Meenakshi & Co., Office on Mill premises.	...	...	...	...	...	...

4.	Madras Co-operative Spg. Mills, Ltd., Guntakal.	6A, Woods Road, Mount Road, Madras.	...	...	...	...	...	...
5.	Madura Srinivas Mills, Ltd., Tirupparankundram Road, Pasumalai Post.	Messrs. Srinivasan & Co., Mg. Agents, Madura (S. India).	...	...	150	...	...	...
6.	Murugananda Mills, Ltd., Pettai, Tinnevelly Town.	Mr. G. Subrahmania Pillai, Mg. Director, Golden Palace, West Car Street, Tirunelveli Town (S. India).	...	...	150	...	...	...
7.	Palar Mills, Ltd., Walajabad	Messrs. Industrial Agencies & Management, Ltd., and Line Beach, Madras.	...	...	...	...	...	...
8.	Ramalinga Mills, Ltd., Mela Chavel, Tinnelveli Dist.	... ...	...	...	...	...	...	...
9.	Swathanthra Mills, Ltd., Makanoor Karur, Trichinopoly Dist.	Messrs. Swami & Murthy, Mg. Agents, 68 Car Street, Karur, Trichinopoly District.	...	...	200	...	...	...
	MYSORE STATE							
1.	Tungabhadra Textiles, Ltd., Harihar, Mysore State.	Messrs. P. Subramanyam, Mg. Director, Office on Mill premises.	...	...	300	...	..	...
	PAKISTAN							
1.	Co-operative Textile Mills Khanewal, Ltd., Khanewal (Dist. Multan), Punjab.	Office on Mill Premises.	...	...	...	...	...	...
2.	Dawood Cotton Mills, Ltd., Landhi, Near Karachi.	Messrs. Dawood Industries, Ltd., 4 Saleh Mohamed St., Gordhandas Market, Karachi.	...	...	...	...	...	...
3.	Emque Towelling & Textile Mills, West Ridge, Rawalpindi Cantt.	... ...	...	...	110	...	...	...

PROGRESS OF COTTON MILLS IN INDIA SINCE 1909

Years ending 30th June	Number of Mills	Number of Spindles installed	Number of Looms installed	Average No. of Hands employed daily	Approximate quantity of Cotton consumed	
					Cwts.	Bales of 392 lbs.
1909 ...	259	60,53,231	76,898	2,36,924	73,81,500	21,09,000
1910 ...	263	61,95,671	82,727	2,33,624	67,72,535	19,35,010
1911 ...	263	63,57,460	85,352	2,30,649	66,70,531	19,05,866
1912 ...	268	64,63,929	88,951	2,43,637	71,75,357	20,50,102
1913 ...	272	65,96,862	94,136	2,53,786	73,36,056	20,96,016
1914* ...	271	67,78,895	1,04,179	2,60,276	75,00,941	21,43,126
1915* ...	272	68,48,744	1,08,009	2,65,346	73,59,212	21,02,632
1916* ...	266	68,39,877	1,10,268	2,74,361	76,92,013	21,97,718
1917* ...	263	67,38,697	1,14,621	2,76,771	76,93,574	21,98,164
1918* ...	262	66,53,871	1,16,484	2,82,[illegible]27	72,99,873	20,85,678
1919* ...	258	66,89,680	1,18,221	2,93,227	71,54,805	20,44,230
1920* ...	253	67,63,076	1,19,012	3,11,078	68,33,113	19,[illegible]2,318
1921* ...	257	68,70,804	1,23,783	3,32,179	74,20,806	21,20,230
1922* ...	298	73,31,219	1,34,620	3,43,723	77,12,390	22,03,540
1923* ...	336	79,27,938	1,44,794	3,47,380	75,30,943	21,51,698
1924* ...	336	83 13,273	1,51,485	3,56,887	67,12,118	19,17,748
1925* ...	337	85,10,633	1,54,292	3,67,877	77,92,085	22,26,310
1926* ...	334	87,14,168	1,59,464	3,73,508	73,96,844	21,13,384
1927* ...	336	87,02,760	1,61,952	3,83,623	84,60,942	24,17,412
1928* ...	335	87,04,172	1,66,532	3,60,921	70,34,237	20,09,782
1929* ...	344	8[illegible],07,064	1,74,992	3,46,925	75,64,081	21,61,166
1930* ...	348	91,24,768	1,79,250	3,84,022	90,07,999	25,73,714
1931* ...	339	93,11,953	1,82,429	3,95,475	92,16,116	26,33,176
1932* ...	339	95,06,083	1,86,341	4,03,226	1,01,89,424	29,11,264
1933* ...	344	95,80,658	1,89,040	4,00,005	99,30,053	28,37,158
1934* ...	352	96,13,174	1,94,388	3,84,938	94,63,965	27,03,994
1935* ...	365	96,85,175	1,98,867	4,14,884	1,09,31,949	31,23,418
1936* ...	379	98,56,658	2,00,062	4,17,803	1,11,34,963	31,81,418
1937* ...	370	97,30,798	1,97,810	4,17,276	1,10,13,632	31,46,752
1938* ...	380	1,00,20,275	2,00,286	4,37,690	1,28,19,268	36,62,642
1939* ...	389	1,00,59,370	2,02,464	4,41,949	1,33,37,569	38,10,738
1940* ...	388	1,00,05,785	2,00,076	4,30,165	1,28,79,559	36,79,874
1941* ...	390	1,99,61,178	1,98,574	4,59,509	1,48,78,577	42,51,024
1942* ...	396	1,00,26,425	2,00,170	4,80,447	1,65,92,527	47,40,722
1943* ...	401	1,01,30,568	2,00,890	5,02,650	1,71,15,763	48,90,212
1944* ...	407	1,02,22,107	2,01,761	5,05,562	1,69,55,920	48,44,563
1945* ...	417	1,02,38,131	2,02,388	5,09,778	1 71,82,599	49,09,314
1946* ...	421	1,03,05,169	2,02,814	4,95,456	1,59,24,762	45,49,932
1947* ...	423	1,03,53,973	2,02,662	4,88,370	1,39,02,546	39,72,156
1948*‡ ...	408	1,02,65,841	1,97,469	4,66,477	1,47,00,595	42,00,170
1949*‡ ...	416	1,05,33,799	1,97,807	4,63,075	1,51,39,033	43,25,438
1950*‡ ...	425	1,08,49,026	1,99,775	4,33,816	1,32,63,229	37,89,494
1951*‡†...	445	1,12,40,635	2,01,484	4,25,032	1,29,05,039	36,87,154

Year ending 31st August.

† Does not include the figures of 26 mills in course of creation and/or recently registered.

‡ Does not include Pakistan.

INSURE WITH

India's Leading Life Office

THE INDUSTRIAL AND PRUDENTIAL ASSURANCE CO. LTD.

Industrial Assurance Building, Fort,

BOMBAY.

(Estd. 1913)

★

V. C. SETALVAD, Esq.,

Managing Director

LIFE FUND OVER Rs. 5,30,00,000

ASSETS OVER Rs. 5,90,00,000

For Particulars and Agencies write to the Company.

DHANRAJMAL GOBINDRAM

BOMBAY, AHMEDABAD, CALCUTTA, KANPUR and KARACHI.

SUB-OFFICES IN ALL IMPORTANT COTTON CENTRES.

IMPORTERS OF ALL KINDS OF FOREIGN COTTON, TEXTILES, YARN, SYNTHETIC FIBRE. EXPORTERS OF INDIAN COTTON, TEXTILES, YARN.

COTTON MERCHANTS and COMMISSION AGENTS
Cotton Ginning and Pressing Factories Owners

AGENTS IN:

LIVERPOOL, NEW YORK, AUSTRALIA, EGYPT AND IN EUROPE.

HEAD OFFICE:

8-10 TAMARIND LANE, FORT, BOMBAY.

Telegraphic Address:

Bombay: "EVERFRESH" (Foreign) & "GURUPUJA" (Inland)

Telephones: 28386 & 42938

When paper shortage was very acute we have given the best possible help to all classes of consumers. Supply position is improving gradually and we hope to be able to offer better services than hitherto. Continue to use Paper and Boards marketed by us under the well-known Trade Marks "ELEPHANT", "TIGER" and "BAMBOO" for quality work.

THE INDIAN PAPER SALES ASSOCIATION (BOMBAY)

Forbes Building, Home Street,

BOMBAY 1.

★

Phone : **30901.**

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Representing :

THE TITAGHUR PAPER MILLS CO., LTD., CALCUTTA.

THE BENGAL PAPER MILL CO., LTD., CALCUTTA.

THE INDIA PAPER PULP CO., LTD., CALCUTTA.

INDIAN COMMERCIAL CO., LIMITED.

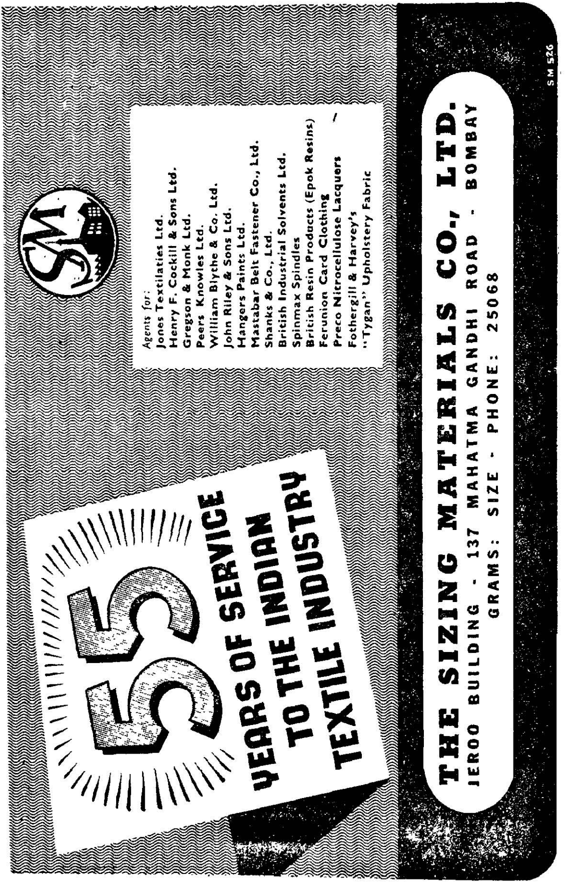
45|47, Apollo Street, Fort, BOMBAY.

Phone : 26506-7-8-9. Gram : "INDCOM", Bombay.

★

Importers of

SODA ASH, CAUSTIC SODA, CAMPHOR, MENTHOL MERCURY, SULPHUR, ESSENTIAL OILS, TEXTILE CHEMICALS, OLD NEWSPAPERS, NON-FERROUS METALS, DIESEL ENGINES, MACHINERIES, ETC.


55
YEARS OF SERVICE
TO THE INDIAN
TEXTILE INDUSTRY
Agents for:
Jones Textilaties Ltd.
Henry F. Cockill & Sons Ltd.
Gregson & Monk Ltd.
Peers Knowles Ltd.
William Blythe & Co. Ltd.
John Riley & Sons Ltd.
Hangers Paints Ltd.
Mastabar Belt Fastener Co., Ltd.
Shanks & Co., Ltd.
British Industrial Solvents Ltd.
Spinmax Spindles
British Resin Products (Epok Resins)
Ferunion Card Clothing
Preco Nitrocellulose Lacquers
Fothergill & Harvey's
"Tygan" Upholstery Fabric
THE SIZING MATERIALS CO., LTD.
JEROO BUILDING - 137 MAHATMA GANDHI ROAD - BOMBAY
GRAMS: SIZE - PHONE: 25068
S M 526

$$Q : LT + S$$

$$P : W + F$$

$$F : Q$$

WHERE

Q = quantity of lubricants consumed

P = power consumed

F = frictional loss

L = lubricant grade

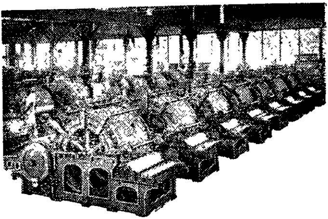
S = system of oiling

etc.

do not let this worry you. Our lubrication experts understand it and they will be happy to come and give you their advice without bothering you with formulae. If you like formulae, however, they say they know lots more.

Balmer Lawrie & Co., Ltd.

CALCUTTA BOMBAY

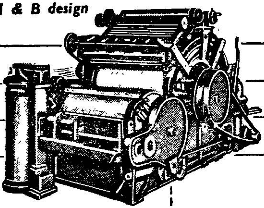


MMC

Revolving Flat

CARDS

Made in India
To H & B design



TRIED and
APPROVED
by many Mills.

Features:

(1) Five distinct setting points, used singly or in combination to control setting to .001 inch.

(2) Bearings for cylinders and doffers made of Johnson bronze.

(3) Self-lubricating 'Oilite' bearings at several locations.

(4) William's patent stripping motion for flats.

(5) Drop lever with new disengaging handle.

(6) Fluted top roller with positive gear drive from feed roll helps the uniform feed of lap at the back with mininum possible stretching.

(7) Cards can be geared for any production in a mill's organization.

Built to H & B design and specifications, MMC Cards incorporate years of research and manufacturing experience. These Cards, manufactured at the MMC Works in Calcutta, conform to the highest standards of material, workmanship and performance. That is why more and more of India's well-known textile manufacturers are now using MMC Revolving Flat Cards. Today, MMC Cards are proving their reliability in Mills all over the country and form an important contribution to the growing stature of Indian Industry.

MACHINERY MANUFACTURERS CORPORATION LIMITED

Managing Agents **MAHINDRA & MAHINDRA LIMITED**

FACTORY: SONAI WORKS, KIDDERPORE, CALCUTTA-23
CALCUTTA OFFICE: HALL & ANDERSON BUILDING, PARK STREET.
HEAD OFFICE. GATEWAY BUILDING, APOLLO BUNDER, BOMBAY

PS MMC-4

Progress Proves Popularity

Here's How **INDIAN GLOBE**

STABILITY

LOOKS IN FIGURES

OUR VALUATION REPORT FOR THE PERIOD ENDING

31-12-1949

IS NOW OUT

	SUM ASSURED Rs.	LIFE FUND Rs.
LAST VALUATION (31-12-1944) ...	1,07,16,658	13,01,769
CURRENT VALUATION (31-12-1949) ...	2,27,70,403	38,32,558
PROGRESS INCREASE - - - -	112 p.c.	194 p.c.

INTERIM BONUS DECLARED:

Rs. 8 per 1,000 Sum assured per annum on Whole Life policies.

Rs. 6 per 1,000 Sum assured per annum on Endowment and other with profits assurances.

Added attraction: **1¼% rebate on yearly premiums.**

The Company also transacts business in:

FIRE, ACCIDENT, MOTOR, WORKMEN'S COMPENSATION, MARINE, ETC.

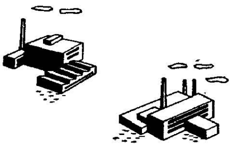
For Agency or other inquiries please refer to:

INDIAN GLOBE

INSURANCE COMPANY LIMITED

315-321, Hornby Road, Fort, BOMBAY.

Telephone: 27288-89 Telegram: "GLOBINS"



Maize Starch *

Most of the following factories—members of the All India Starch Manufacturers' Association—are actively engaged in the production of starches—principally Maize Starch.

Anil Starch Products Ltd., Ahmedabad
Faridkot Chemicals, Faridkot
Gwalior Maize Products Ltd., Mandsaur
Hargaon Starch Products, Hargaon
Hindustan Colour, Chemicals and Mfg. Co., Ltd. Ahmedabad 8
Hyderabad Starch Products Limited, Hyderabad—Dn.
India Starch & Chemicals Co. Ltd., Kalol
Jaipur Maize Products Co., Jaipur West
Kotah Chemicals & Food Products, Baran
Laxmi Starch Factory, Kundara
Narang Industries Ltd., Nawabganj
Patiala Starch & Chemical Works Ltd., Rajpura
Pearl Products Co., Ltd., Bombay & Kanpur
Rampur Maize Products Ltd., Rampur
Shree Narendrasinghji Industrial Corporation Ltd., Dohad
Sukhjit Starch & Chemicals Ltd., Phagwara
Starch Products Ltd., Cambay
Union Starch & Chemical Works, Balasinor

MAIZE STARCH : THE BEST SIZING MATERIAL — CHEAPER IN THE LONG RUN

ALL INDIA * STARCH MANUFACTURERS' ASSOCIATION

12, RAMPART ROW, BOMBAY 1

SISTAS'-SS-7.

MADRAS